Persaction User Guide

June 1997

Department of Defense
Civilian Personnel Management Service

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TABLE OF CONTENTS

TABLE OF FIGURES

CHAPTER ONE: INTRODUCTION

Welcome to the PERSACTION User's Guide.

This Guide applies to the Department of Defense (DoD) Personnel Action System (PERSACTION). PERSACTION is an interactive Human Resource Management System that automates the process of creating, editing, approving, coordinating, and tracking personnel actions from initiation of the Personnel Action Request (PERSONNEL ACTION REQUEST) to final submission to the Defense Civilian Personnel Data System (DCPDS). It allows initiation of the PERSONNEL ACTION REQUEST on a computer screen and electronically tracks the status of the action throughout the entire process. PERSACTION may be accessed by personnelists as well as managers in serviced organizations. The screens and written documentation for this user guide was written using XVision . Therefore some of the screens may appear different than those users of CDE Runtime.

Purpose and Objectives

Purpose

The purpose of PERSACTION is to provide a single, fully integrated system for managing DoD's personnel action process. The principle goal of the system is to provide DoD personnelists, managers, manpower, and financial representatives with an automated personnel action processing capability.

Objectives

The primary objective of the system is to eliminate all unnecessary and duplicate steps in preparing and processing PERSONNEL ACTION REQUEST actions. In satisfying that objective, PERSACTION has the following features:

- It allows managers to electronically initiate and forward a personnel action to appropriate offices using information retrieved from DCPDS.

- It provides management with the capability to monitor the status of personnel action requests.

- It allows personnelists to initiate and coordinate a personnel action request while using data and tables from DCPDS to complete the action.

- It provides reports summarizing employee and position data that are retrieved from DCPDS.

- It uses screens, push command buttons, radio buttons, and lists of values to provide users with choices and directions. PERSACTION also uses text input fields for data entry. With proper access, users can request, edit, authorize, and/or approve a variety of personnel actions. All action requests can be coordinated through the final approving official and tracked for future reference. PERSACTION also prints reports and personnel action request forms.

User Information

Users must be familiar with the basic operation of a personal computer (PC), a mouse, and a printer. In contrast to traditional key-stroke based applications, the mouse is the primary input device used to carry out most functions within PERSACTION. This emphasis on the mouse does not mean that users cannot use the keyboard, but most will find that they interact best with the program through the mouse. Users who are not experienced with Windows applications and use of a mouse should review Chapter Two of this Guide.

The PERSACTION User's Guide provides instructions on using the system and is specifically designed for individuals who are responsible for requesting and/or approving personnel action requests as well as personnelists who prepare personnel actions for transmission to DCPDS.

User's Guide Conventions

To help the user locate and interpret information easily, the Guide uses various document conventions and visual cues, such as **"bolding"** to highlight a phrase within a text. Other conventions are:

- Components of the PC keyboard, such as the **[Enter]** key, are bolded and placed in brackets.
- This **checkmark** is used to point out a note of additional information, such as a tip for first-time users.
- Command Buttons are capitalized and placed in quotation marks, e.g., "CREATE", "TRACKING" and "EXIT."

PERSACTION Process Flow Diagram

The diagram below is a simple representation of the flow of data in PERSACTION in response to initial personnel action requests and queries from external users.

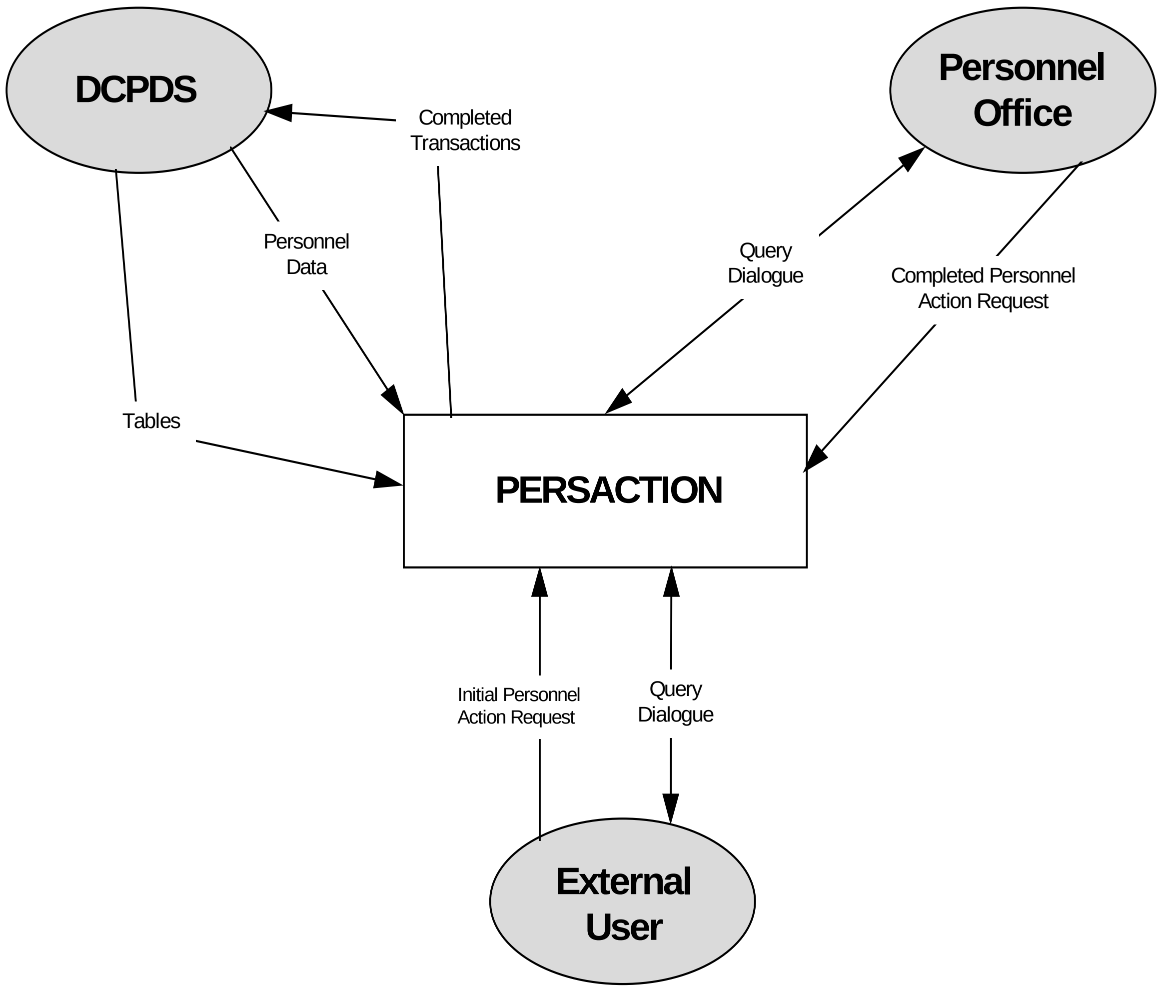

Figure 1-1. PERSACTION Diagram

Security And Privacy

The information created and stored within this system is UNCLASSIFIED FOR OFFICIAL USE ONLY. Access to PERSACTION data is subject to the Privacy Act of 1974. It is the user's responsibility to provide adequate computer security to protect this information in accordance with current regulations and guidance.

Controlling Access To PERSACTION

Normally, all individuals involved in preparing, reviewing, authorizing, or processing personnel actions will have access to PERSACTION. Access is predetermined by management and is controlled by the Username and Password combination. PERSACTION provides management with the capability of limiting any user's access to employee, organization, and position data. It can also establish functional privileges for each user, such as the ability to create or edit a PERSONNEL ACTION REQUEST.

PERSACTION has two levels of access based on whether the user is a manager or personnelist. Access to certain blocks on the PERSONNEL ACTION REQUEST form is restricted based on a user's level of access. For more information, see Chapter Five, "Creating a PERSONNEL ACTION REQUEST Action".

Access does not change a manager's authority to request and/or authorize requests for personnel actions. For instance, some managers may be given permission to only request an action, while others will be given permission to request and authorize an action. Questions about access level and privileges should be referred to the Integrated Personnel ProcessImprovement (PPI) Suite Program Coordinators.

Assistance And Problem Reporting

This Guide supports the release of the PERSACTION system within the Integrated PPI Suite. Since questions or problems may arise during the fielding of any software application, the Guide provides functional and technical contacts to answer questions, receive suggestions for improving the software or reference materials, and resolve technical problems.

Help Desk

If users cannot resolve technical or functional problems with PERSACTION, they should contact the local Integrated PPI Suite Program Coordinator. **Program Coordinators will forward the user's request for assistance to the Help Desk**.

All requests for assistance should include the following information:

1. Name and user identification
2. Component name
3. The type of action in process at the time the problem occurred
4. The exact steps taken prior to the problem's occurrence
5. The exact error messages received
6. A thorough description of the problem.

If the local Integrated PPI Suite Program Coordinator is not available, users may contact the Air Force Personnel Center (AFPC) Software Distribution Center Help Desk. The Help Desk's telephone numbers are: toll free, 1-800-638-3487; commercial, 210-652-3995/2849; or DSN, 487-3995/2849. The fax number is commercial 210-652-5800 or DSN 487-5800. All problems should be submitted to the Integrated PPI Suite Program Coordinators as soon as possible.

User's Guide

This version of the PERSACTION User's Guide has been reviewed for clarity and functional accuracy by functional personnel. However, users of the Guide may find discrepancies or errors that were missed during the review process, or they may have suggestions for improving it. Any discrepancies or suggestions for improvement **should be** reported by Integrated PPI Suite Program Coordinator to Defense Civilian Personnel Management Service, Regionalization and Modernization Functional Program Management Office by fax on 703-696-5468 or DSN 426-5468 or via email to carolyn.mcknight@cpms.osd.mil. All written requests or suggestions should include the following information.

1. Name
2. Telephone number (DSN)
3. Component or activity name
4. Chapter and page number of the discrepancies, if any
5. Description of the suggested improvement.

Integrated PPI Project Manager

General questions concerning the fielding and support of PERSACTION may be addressed to the Integrated PPI Program Manager, Roger Kirsch, at 703-696-4553 or DSN 426-4553 or email roger.kriesch@cpms.osd.mil or to the PERSACTION Project Manager, Robert Schmidt. He can be contacted by telephone at commercial 703-696-2666, or DSN 426-2666, or via fax on DSN 426-5430 or email robert.schmidt@cpms.osd.mil.

CHAPTER TWO: GETTING STARTED

This chapter contains detailed step-by-step procedures for the first time or occasional computer user and for those users who are unfamiliar with Windows applications. It presents sufficient detail so that users may easily access the application before learning the details of its functional capabilities.

These sections may be disregarded if the users are familiar with the basic operation of Windows 3.1 or Motif X-windows, personal computers (PCs), a mouse, and laser printers.

Requirements

All users must be familiar with the basic operation of a PC, mouse, and printer. A 486 DX-33 PC is highly recommended, with at least 8 MB RAM and 340 MB hard drive. Users must have an Internet Protocol address or a modem. In addition, X-Vision or CDE runtime is required to operate PERSACTION under Windows 3.1 or XWindows/Motif in a UNIX environment.

Working with Windows

This section of the Guide provides users with basic information on the use of Windows.

✔ Skip this section if the user is familiar with running Windows applications.

Windows Tutorial

Before proceeding, users should be familiar with the basic Windows environment. If not, users should access the Windows Tutorial, which is an interactive, on-line program that covers the basics of using a mouse and Windows. The Windows Tutorial Program is accessible from the Program Manager, as the following steps illustrate.

Using the Mouse. While in the Program Manager Window, click the Help Menu and then the Windows Tutorial command.

Using the Keyboard. Press and hold down the **[Alt]** key, then press the **[Tab]** key repeatedly until "Program Manager" appears in the small window in the middle of the screen. Release both keys. Press and hold down the **[Alt]** key, then press the **[H]** key. Release both keys. Press the **[Down Arrow]** key to select the Windows Tutorial, then press the **[Enter]** key.

✔ **Working with multiple applications**. Users should be aware that because of the large amount of working data and complex processing of the data in PERSACTION, running other Windows applications with PERSACTION is not recommended. Even while running just PERSACTION, some activities may experience a noticeable delay. During these delays, the screen pointer appears as a watch or hourglass. The pointer returns to normal when the process is complete.

The Keyboard and PERSACTION

Primary Keys used in PERSACTION

The following keys are common to most PCs and may be used to navigate through the various screens in PERSACTION. However, as discussed earlier in the Guide, users will find that much of the interaction with the software is accomplished by using the mouse.

DELETE	This key deletes, removes, or eliminates any character that appears at the screen pointer.
ENTER/RETURN	This key moves the screen pointer to the beginning of the next field or line.
SPACE BAR	This key can be used to activate a highlighted button on the bottom of a window.
TAB	This key moves the screen pointer forward to the next column or position on the screen.

General Operations

Initiating a PERSACTION Session

To initiate a PERSACTION session, go to the Windows Program Manager screen and click the icon that contains the PPI icon, if the system is setup using an icon access. This will initiate the “Logon” screen. Enter the assigned ORACLE Logon Username and Password. Place the mouse pointer on the “CONNECT” button and click. If using the keyboard, press the **[Tab]** key and enter the assigned password, press the **[Enter]** key or click the “CONNECT” button. Once this is completed the PPI Application Main Menu will be displayed with the PERSACTION APPLICATION ready to be accessed. **Initiating a PERSACTION session is discussed further in Chapter Three of this Guide.**

Exiting, Stopping or Suspending Work

To stop PERSACTION from processing a particular function, click the “CANCEL” button at the lower left of the current screen. Users may continue this process with each screen until they are returned to the PERSACTION “In Box” screen. Click the “QUIT” button on a screen to bring users back to the “Application Menu” screen. To exit PERSACTION at the “PPI Application Menu” screen, click the “EXIT” button.

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CHAPTER THREE: INITIATING A PERSACTION SESSION

This chapter describes the steps used to initiate a PERSACTION session.

Initiating a Session

The PERSACTION application is accessed through the Integrated Personnel Process Improvement (PPI) program. The instructions for accessing this program may vary depending on individual Component. Click the PPI icon, if the system is set up in this method. ,This will initiate the PPI Application and display the "LOGON" Screen shown in Figure 3-1. After entering the users' assigned Username, press the **[Tab]** key to go to the "Password" block. After entering the users' assigned Password, press the **[Enter]** key or click the "CONNECT" command button. Click "CANCEL" to end the session.

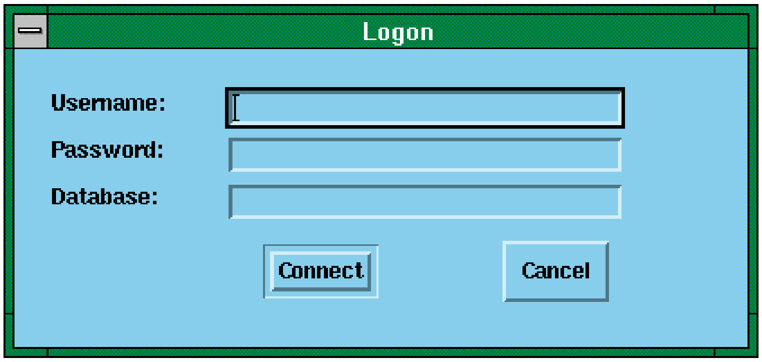

Figure 3-1. Logon Screen

PPI Application Menu

The following Personnel Process Improvement (PPI) Application Menu will appear after the correct Username and Password combinations are entered into the Logon Screen.

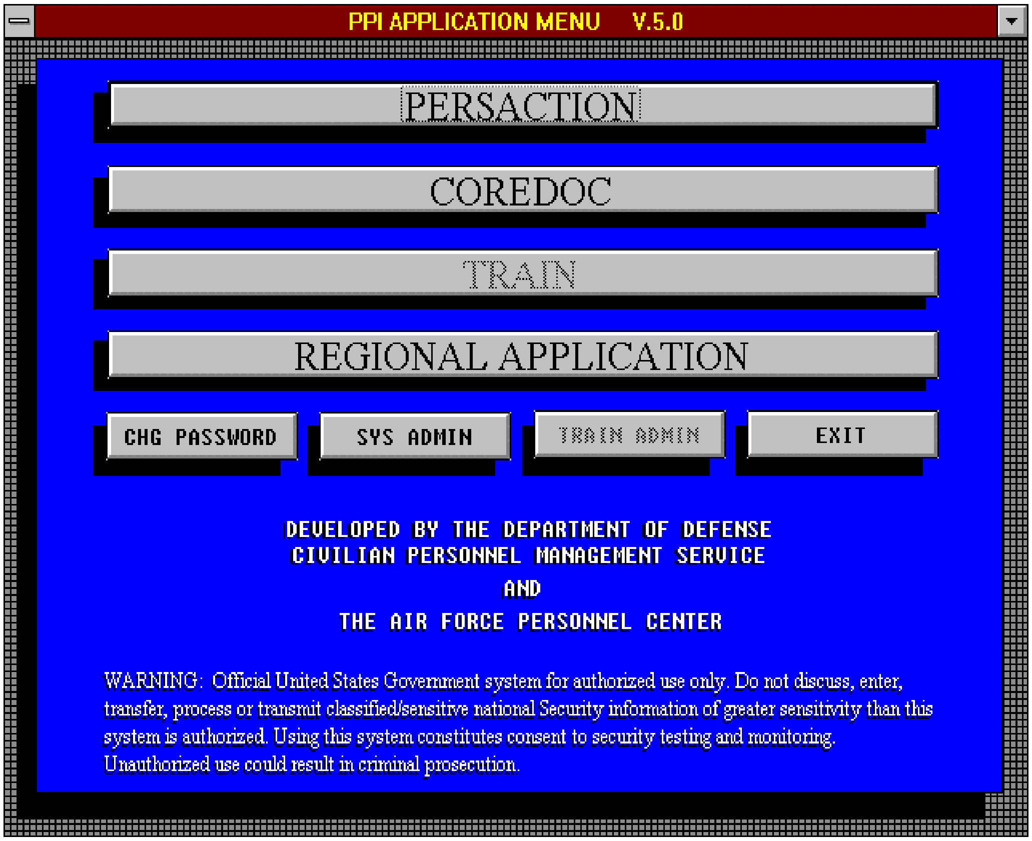

Figure 3-2. PPI Application Main Menu Screen

The PPI Application Menu is the entry point into the PERSACTION application. Click the PERSACTION block with the mouse or use the **[Tab]** key until PERSACTION is highlighted, press the **[Enter]** key. The PERSACTION Program will begin. The application also allows users to change their “UNIX” or “ORACLE” password. Clicking the “EXIT” button returns the user the Program Manager Window. As mentioned earlier, it is through this screen that the PERSACTION functions are accessed.

Password

The “Password” button allows users to change their password within the Integrated PPI Suite application.

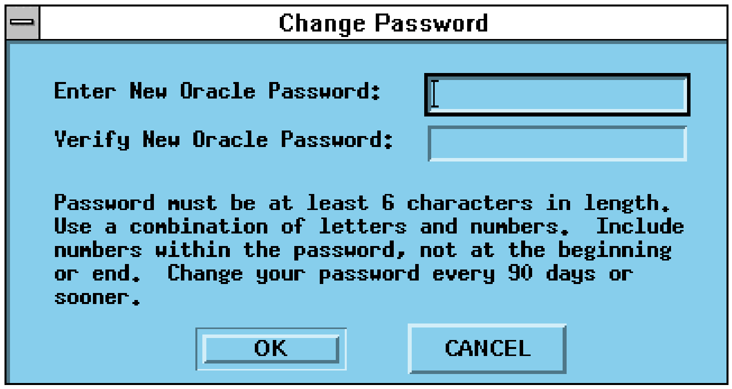

Figure 3-3. Change Password Screen

To change a user’s password from the PPI Application Menu (Figure 3-2), press either the **[Tab]** or **[Enter]** key to highlight the “Password” option. After the option is selected, press the **[Space Bar],** or click the left button of the mouse. The application will display a message asking the user if they wish to change their Oracle or UNIX password. Select the “Oracle” button and the application will display the “Change Password” Dialog Box shown in Figure 3-3. After entering the user’s new password, press the **[Tab]** key to go to the “Verify New Oracle Password” block, then press the “OK” button. Click “CANCEL” to retain the old password.

As previously mentioned, the PPI Application Main Menu (Figure 3-2) is the entry point into the PERSACTION, COREDOC, TRAIN, and Regional Application within the Integrated PPI Suite. Upon selection of the “PERSACTION” option, the application takes users to the In Box screen shown in Figure 4-1.

CHAPTER FOUR: THE IN BOX

This chapter describes the contents of the In Box, including the fourteen option buttons at the bottom of the screen. It also discusses the following options in some detail:

- Attaching a note to an action.
- Changing the sort of actions within a user's In Box.
- Deleting an action.
- Closing an action (personnelist only).
- Printing Actions.
- Attach Document

Contents of the In Box

The In Box screen, which shows active records, contains actions that the user created, as well as actions that were sent to the user for coordination or processing. These actions remain in the In Box until they are coordinated (forwarded) to another In Box, deleted by the originator, or closed by the Civilian Personnel Office.

Initially, the personnel actions are shown on the screen in ascending order by Request Number. The top request is highlighted when this screen first appears. **The highlighted record is indicated by a black rectangle around all the information on that line.** To select another request, use the **[Up/Down Arrow]** key or the mouse to move though the list and highlight the appropriate selection. If there are several pages of requests in the In Box, the **[Page Up]**, **[Page Down],** or **[Arrow]** keys, as well as the scroll bar, provide faster means for moving through the In Box.

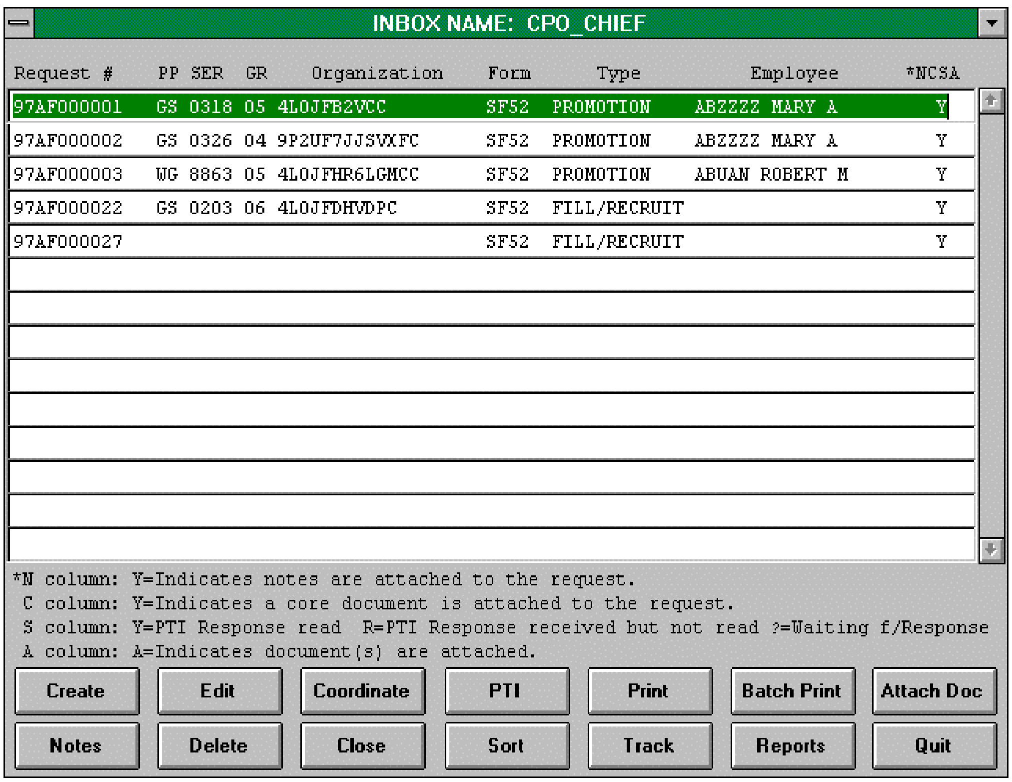

Figure 4-1. PERSACTION In Box Screen

Columns. Figure 4-1 shows an In Box screen with a record highlighted. The In Box contains nine columns that provide general information for each personnel action, including the Request Number; Pay Plan (PP); Series; Grade; Organizational Code; Forms Used; Type; Employee Name; whether notes are attached to the action; and if the action was submitted to DCPDS.

The **"*NCSA"** column provides information concerning a personnel action. The asterisk indicates that a legend is provided at the bottom screen.

- The **"N"** column with a "Y" indicates a note is attached to the request, if blank, there is no note attached..
- The **"C"** column with a "Y" denotes whether a core document was created for the highlighted personnel action. If the **"N"** or **"C"** column is **blank**, then no attachment exists for the corresponding action.
- The **"S"** column provides information concerning the transmission of the personnel action to DCPDS.
  - A **"Y"** indicates the PTI response has been read by a personnelist.
  - A **"R"** indicates that the response has been received, but not yet read.
  - The **"?"** indicates the actions was submitted to DCPDS, but the personnelist has not yet received a response.
- The **"A"** column with an **"A"** indicates documents are attached.

Options. The In Box has 14 command buttons located at the bottom of the screen. The buttons are described below.

Create

The "CREATE" button enables users to view a list of available forms. By highlighting one of the forms and clicking "OK", users may produce a copy of the form. **See Chapter Five: "Creating a Personnel Action Request" for more information.**

Edit

This button allows users to view or modify the highlighted personnel action request. **See Chapter Five: "Creating a Personnel Action Request" for more information.**

Coordinate

By selecting the "COORDINATE" command button, users can access the coordination module. The coordination module allows users to coordinate (i.e., forward) the highlighted personnel action request to another In Box. The module also gives users the capability to add notes to the action. After the personnel action request has been coordinated, the personnel action request is no longer in the forwarding user's In Box. **See Chapter Six: "Coordinating and Tracking Actions" for more information.**

Personnel Transaction Identifier

This option is available only to personnelists. By selecting this button, PERSACTION generates a Personnel Transaction Identifier (PTI) for the selected personnel action request. **For additional information on generating PTIs, see Chapter Eight, "Personnel Office Instructions for Processing a Personnel Action Request".**

Print

Click this button to enable users to view and print the selected personnel action request. Click "file option" and select the name of the printer. When the PERSONNEL ACTION REQUEST is on the screen, click the "PRINT" command button at the top of that screen to print a copy. Information about the printer and printer name can be obtained from the Integrated PPI Suite Program Coordinator.

Batch Print

The User's In Box screen includes the button, "BATCH PRINT". Selecting this option allows the user to print multiple Personnel Action Requests. Information about the printer and the printer name must be obtained from the Integrated PPI Suite Program Coordinator. **For more information, see the section entitled, "Printing Multiple Actions".**

ATTACH DOC

This button enables users to append documents to support a requested Personnel Action. Some examples of the types of documents that are attached would include position description, core documents, memos, etc. The attach function **is not** available for users of X-Vision. This function is available **only** for users of CDE Runtime.

Notes

This button enables users to view a personnel action request and to add notes to the request. All users that work on a personnel action request has the opportunity to add notes. **See the section entitled, "Creating, Viewing, and Editing Notes for a Personnel Action", below for more information.**

Notes entered in the "Remarks by Requesting Office" block on page four of the PERSONNEL ACTION REQUEST are **NOT** displayed in this block.

Delete

This option allows the **originator of a personnel action** to delete a personnel request action and its associated records. Confirmation is required before a selected personnel action request can be deleted.

To delete a personnel action request, highlight the request to be deleted and click the "DELETE" button. The application then displays a confirmation window that shows the Request Number that the user has highlighted. Click the "OK" button to delete one record from the In Box. Deleting a PERSONNEL ACTION REQUEST also removes it from PERSACTION. Click the "CANCEL" button to stop the delete function.

✔ **Warning:** Once an action has been deleted, it cannot be recovered and must be regenerated.

Close

This option should only be used when the personnel action request has been successfully updated in DCPDS and is ready to be closed. Once a personnel action request is closed, it is only available in the tracking module. Confirmation is required before closing the selected personnel action request. A closed personnel action request may be reopened if necessary. **See Chapter Eight: "Personnel Office Instructions for Processing a Personnel Action Request" for more information.**

Sort

This option allows users to choose the order that personnel action requests are displayed in the In Box. As mentioned earlier in this chapter, the default order is by ascending Request Number. Personnel action requests can also be sorted by Pay Plan, Series, Grade, Organization Code, Type of Request, and Employee Name. **See "Sorting Actions" section below for more information.**

Track

This option enables users to view the coordination information, such as the location and status of an action. It also includes a note feature that can be used to provide additional information about the action that is not appropriate for entry on the PERSONNEL ACTION REQUEST form. **See Chapter Six: "Coordinating and Tracking Actions" for more information.**

Reports

This option activates the reports module. **See "Chapter Seven: Reports" for more information.**

Quit

This option allows users to exit from the In Box and return to the "PPI Application Menu" screen.

Creating, Viewing, and Editing Notes for a Personnel Action

Users can create notes regarding any personnel action request from their In Box. To create a note, click the "NOTE" button at the bottom of the screen.

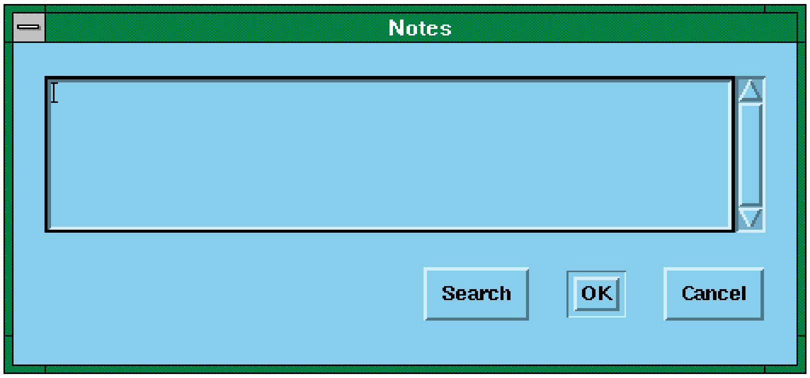

Figure 4-2. Notes Screen

Users can add notes by placing the cursor in the text window. The text window contains a basic text editor, so users can type any note regarding the action.

Users can use either one of two methods to search for a specific note. They can place the cursor on the scroll bar and click the **[Down Arrow]** until the desired note appears. Users can also click the "SEARCH" button. A pop-up window then permits users to search for a word or group of words. If notes are added to a personnel action request, a **"Y"** will appear on the In Box screen (Figure 4-1) for the request (next to the last column on the screen that is labeled "N").

✔ Remember, all users receiving this action are able to view the notes. **Once a note is placed on this screen, it becomes part of the official record.**

Sorting Actions

This option allows users to change the way personnel action requests are displayed in the In Box. The default order is by ascending request number. Personnel action requests can also be sorted by Pay Plan, Series, Grade, Organization Code, Type of Action, and Employee Name. The dialog box below is used to select the fields to be sorted.

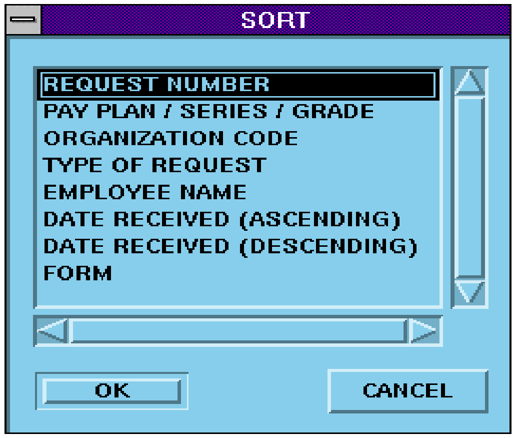

Figure 4-3. Sort Pop-Up Window Screen

To change the sort of the actions in the In Box, click Request Number, Pay Plan/Series/Grade, Organization Code, Type of Request, Employee Name, Date Received (Ascending), Date Received (Descending), or Form; then click the "OK" command button. The actions will be sorted by the sort selected by the user.

Printing Multiple Actions

The User's In Box screen has a "BATCH PRINT" button. Click the "BATCH PRINT" button and the application will display the Print Forms screen (Figure 4-4).

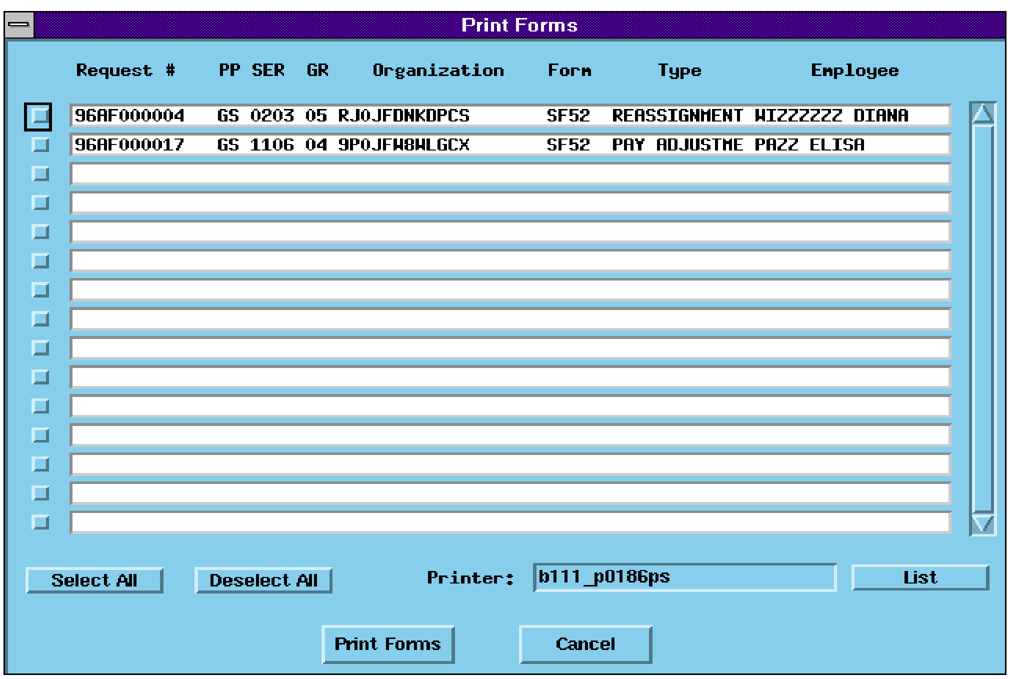

Figure 4-4. Print Forms Screen

The Print Forms screen, contains actions that the user created, as well as actions that were sent to the user for coordination and processing. The personnel actions are shown on the screen in ascending order by Request Number.

To locate a request, use the **[Up/Down Arrow]** keys or the mouse to move through the list. If there are several pages of requests in the Print Forms screen, use the scroll bar or the **[Page Down]** key. Users can select or deselect one or more personnel actions by clicking the button to the left of the form. They can also select all of the Personnel Action Requests by clicking the "Select All" button at the bottom of the screen.

To select a particular printer, users must click the "LIST" button shown to the right-hand side of the "Printer" block. The application will then display the "Select Printer" Dialog Box (Figure 4-5).

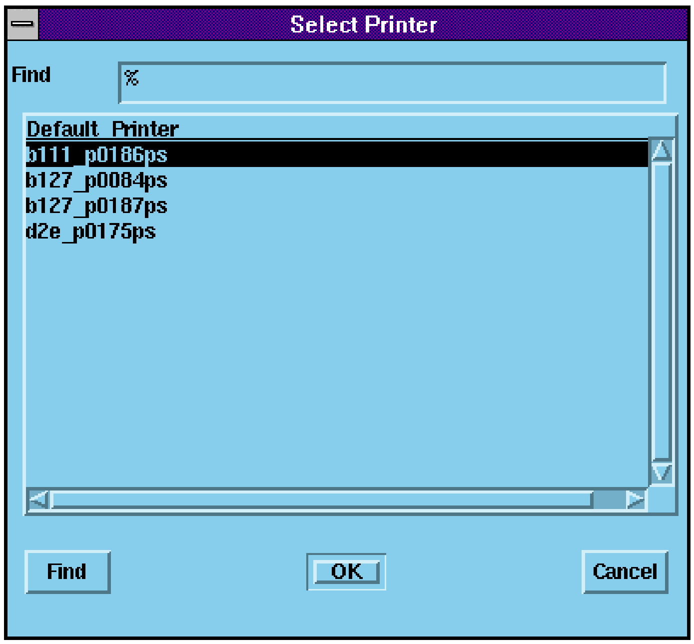

Figure 4-5. Select Printer Dialog Box Screen

Users may use the scroll bar or the "Find" feature to locate a particular printer. If the printer is not found, users **must** contact their Integrated PPI Program Coordinator or System Administrator. After the user has highlighted the desired printer, click the "OK" button. Click the "Cancel" button to return to the "Print Forms Screen (Figure 4-4).

To print the selected actions, users must click the "Print Forms" button (Figure 4-4). The application will then send the selected actions to the printer designated by the user.

CHAPTER FIVE: CREATING A PERSONNEL ACTION REQUEST

This chapter describes how to create a Personnel Action Request. The information in this chapter applies to all PERSACTION users.

Access to PERSACTION

The individuals involved in preparing, reviewing, or authorizing personnel actions normally will have access to PERSACTION within the Integrated PPI Suite. However, management actually determines who has access to PERSACTION. Access is controlled by Username and Password combinations. Permission tables within PERSACTION are used to control access to position and employee data and to establish functional privileges for all users, such as the ability to edit or delete an action.

PERSACTION has two levels of access based on whether the user is a supervisor/manager or personnelist. Access to certain blocks on the Personnel Action Request form are restricted based on the user's level of access. Additionally, the "PTI", "DINs", and "Remarks" buttons on the bottom of Page Five of the Personnel Action Request are accessible only by personnelists.

The first level of access enables supervisors and managers to view, coordinate, track, and print the Personnel Action Request form. They may also be given additional privileges, including the ability to edit, create, delete, authorize, or approve a Personnel Action Request.

Functional privileges do not change the authority a manager previously had with respect to requesting and/or authorizing requests for personnel actions. As an example, some managers may only be given permission to request an action, while others will be given permission to request and authorize actions. Questions about access levels and permission tables should be referred to the local PPI Program Coordinator.

The second level of access allows personnelists with sufficient "edit" privileges to prepare a Personnel Action Request and to submit it for final processing to DCPDS. Some personnelists may be given additional privileges, such as the capability to create, delete, or print an action; specify a "Nature of Action"; send a transaction to DCPDS for processing; and close an existing action.

Creating a Personnel Action Request

To create a Personnel Action Request, click the "CREATE" button at the bottom of the In Box screen (see Figure 4-1). Figure 5-1 shows the screen that is displayed. Users have the choice of selecting either the Personnel Action Request or one of the Local National Forms, e.g., the AE Form 690-60A, German Local National form. Click the first option and then the "OK" command button. After selecting either the Personnel Action Request or one of the Local NationaI Forms, an "Actions" menu is displayed. Select the "Action" to be processed by using the scroll bar or the **[Down Arrow]** to highlight the desired action. Press the **[Enter]** key. If the "CANCEL" command button is clicked, the software returns the user to their In Box.

Figure 5-1. Create a Record Screen

The Personnel Action Request form shown on the screen is essentially identical to the paper form, except it appears as a series of five screens or pages. Users may press either the **[Tab]** or **[Enter]** key, or use the mouse to move from one block to another. They may also move to another page by clicking the desired page number button on the lower left hand corner of the Personnel Action Request page.

Several blocks on the Personnel Action Request have a help screen or list dialog box to assist in completing the block. The help screen or dialog box can be accessed by clicking in the field next to the block. Users can select a value from the list dialog box by either double-clicking the selection, or using the **[Down Arrow]** key to highlight the item on the list and press the **[Enter]** key. The selected text is then added to the Personnel Action Request form.

Six command buttons appear at the bottom of pages one through four -- “OK”, “LIST”, “REGIONAL”, “ATTACH”, “COREDOC”, and “CANCEL”. These command buttons are described below:

- **OK.** Clicking this command button places the action in the In Box, including the changes that the user had made up to that point.
- **LIST.** This command button can be highlighted **only** if a user has access to the block. When the user selects a block and the “LIST” button is active, clicking it produces a list of options for that block.
- **REGIONAL.** By clicking the "REGIONAL " command button, the application displays several **"view only"** screens from the Regional Application. Since most Personnel Action Request data, such as conversion due dates, temporary appointment dates, and time-in-grade dates, are included in the Employee Data screens, these screens should be helpful in creating and processing personnel actions. For more information, see the Chapter Seven, “Reports” or Chapter Four of the Regional Application User Guide.

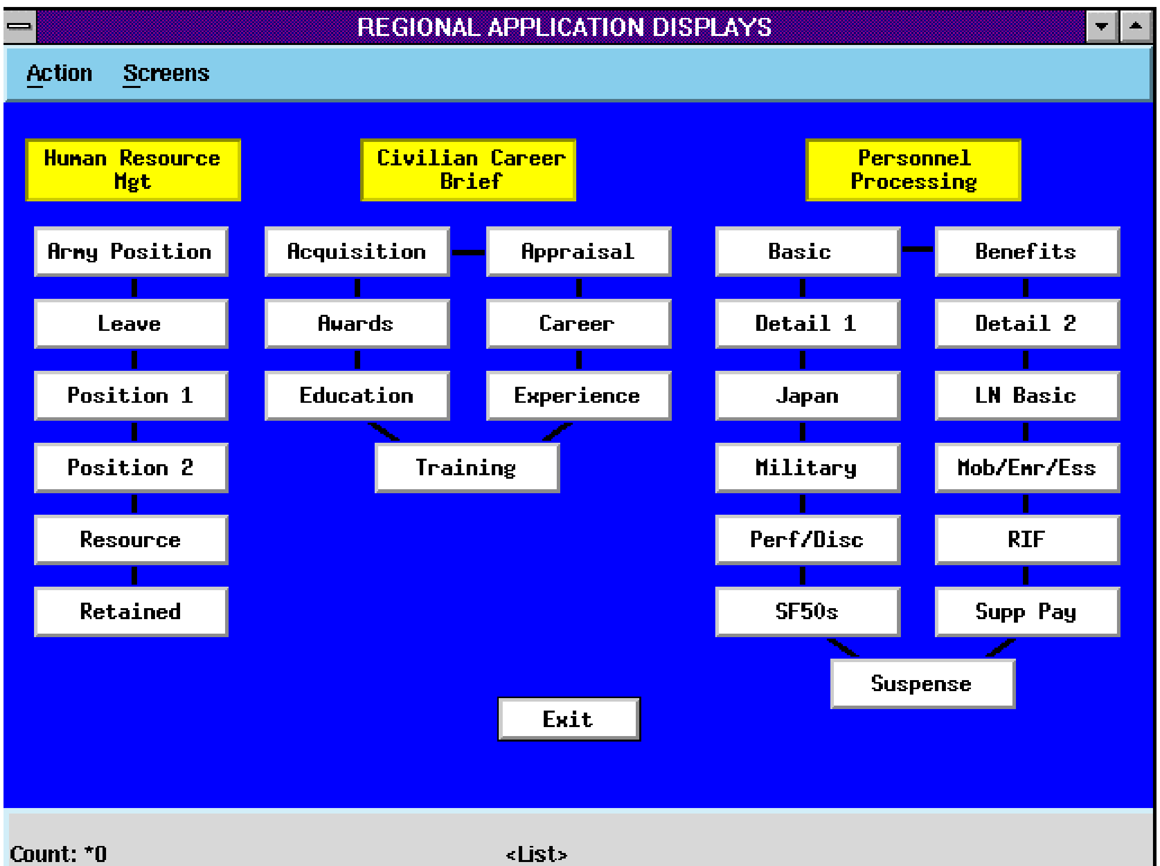

Figure 5-2. Regional Application Displays Screen

- **ATTACH.** This button allows users to attach a core document from the COREDOC system to an individual Personnel Action Request. *A Personnel Action Request must exist before a core document can be attached to it.* Once a Personnel Action Request has been created, a user can select the appropriate core document to be attached. After the user attaches a core document, the Personnel Action Request will then be flagged with a "Y" in the "C" column in the User's In Box.
- **COREDOC.** This button allows users to create a new core document that will be attached to a Personnel Action Request. Once a core document is attached to a Personnel Action Request, only the user that created the core document can unattach or make modifications to it.
- **CANCEL.** This command button returns users to their In Box **without saving** any changes made to the action.

Page Five of the Personnel Action Request form contains three additional command buttons for personnelists. These command buttons "REMARKS," "PTI," and "DINs" will be discussed in Chapter Eight.

Page One of the Personnel Action Request

The first page of the Personnel Action Request contains "Part A - Requesting Office" information and the first four blocks of "Part B - For Preparation of SF-50".

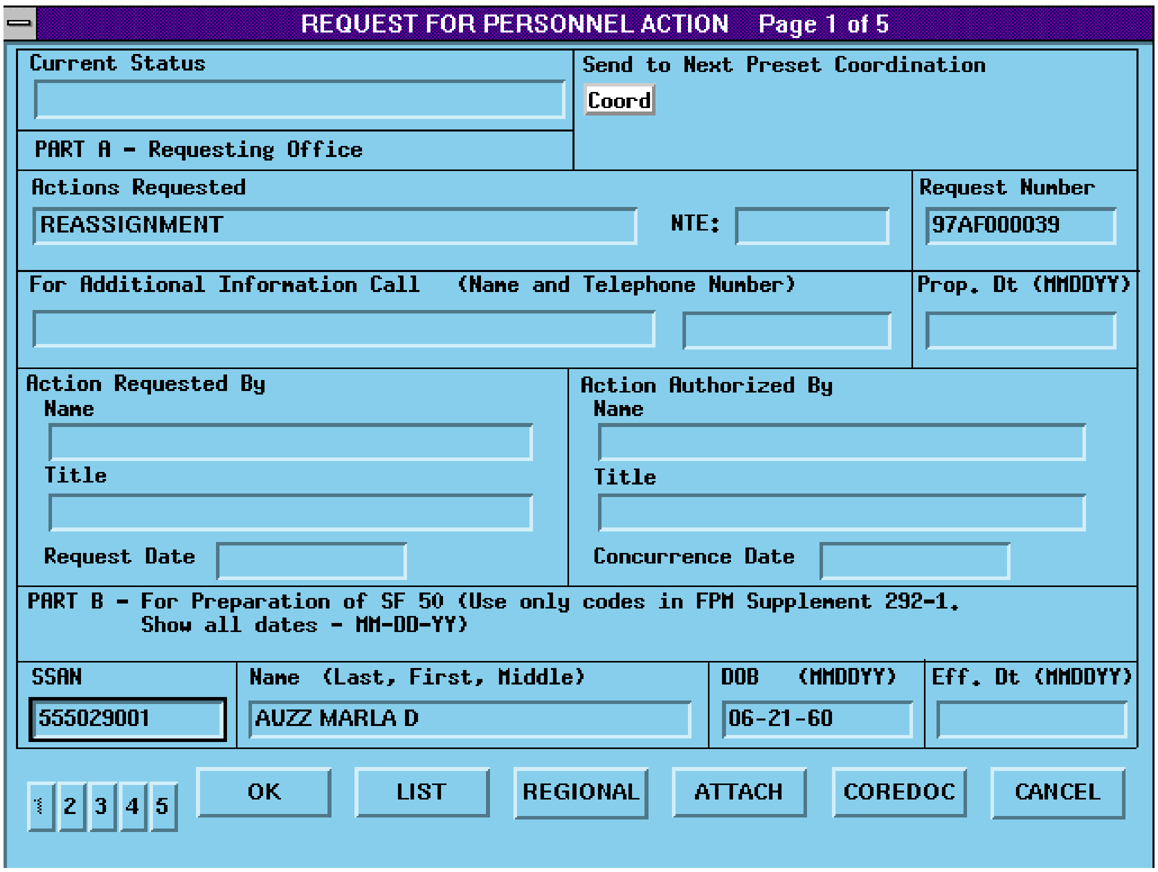

Figure 5-3. Request for Personnel Action, Page One

Part A - Requesting Office

This section of the Personnel Action Request contains information concerning the Current Status, Type of Action, Request Number, Point of Contact for the Action, Effective Dates, and signature blocks for the requesting and approving officials. The individual blocks on Part A of the Personnel Action Request are described below.

Current Status. This block allows users to view the status of an individual personnel action request. PERSACTION does not automatically update the status of an action. Therefore, users must change the status of the action before they coordinate to another user. To update this "Current Status" block, click the "TRACK" command button located on the In Box screen. For more information, see Chapter Six: Coordinating and Tracking Actions.

Send to Next Preset Coordination. This block contains a "Coord" button that allows users to send a personnel action request to the next user on a previously established route slip. To send the action to the next person on the route slip, click the "Coord" button. The application will display a message that states "Sending when the OK button is pressed". PERSACTION will also display the name of the individual or organization receiving the action. Click the "OK" button to proceed to the next block. Users should refer to Chapter Six of this guide for more information concerning creating a route slip.

Actions Requested. Similar types of personnel actions are consolidated in a list that can be accessed by clicking the "**Actions**" box (Figure 5-4). This dialog box is automatically generated after selecting "CREATE" from the In Box. After a Personnel Action Request has been created, the dialog box may be displayed by clicking the "Actions Requested" block of the Personnel Action Request.

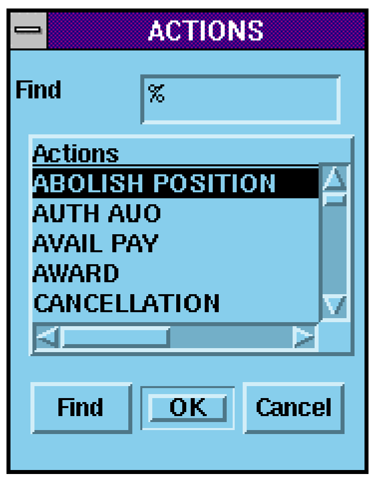

Figure 5-4. Actions Requested Dialog Box Screen

Using the scroll bar, locate a particular type of action that best describes this action. If a particular type is not listed, select "OTHER." The application then asks users to enter a literal. The "OTHER" entry is used only if no other options are appropriate. Highlight the action and click the "OK" command button to enter a selection into block one of the Personnel Action Request.

If "FILL/RECRUIT" is selected, the application prompts the user to complete a "Vice" entry. At this point, type in the name of the individual who previously held the position being filled. If "EXTENSION" is selected, users are prompted to enter the Type of Action being extended, such as "Temporary Promotion" or "Detail." As mentioned earlier, if "OTHER" is selected, users are prompted to enter the specific action.

NTE Date. This block is completed if the action being requested is temporary in nature. Users may enter either an ending date or a length of time (such as six months). The block is left blank if the action being requested has no ending date.

Request Number. The Personnel Action Request Number is completed automatically by the application as part of the creation and tracking features. **Users cannot navigate to or modify this block**.

For Additional Information Call. This block provides the name and telephone number of the point of contact for the action.

Proposed Effective Date. Enter the effective date in month-month/day-day/year-year format, without hyphens or slashes. The application inserts the hyphens. Alpha characters (such as ASAP) are not permitted in this block.

Actions Requested By. Users may complete these blocks if they have permission to request actions. When the "Name" block is selected, the dialog box shown in Figure 5-5 is displayed. It requests users to enter their password for "Request Authorization".

Figure 5-5. Request Authorization Dialog Box Screen

After the password is entered, click the "OK" command button. When the correct password is entered, the application enters the user's name, title, and the current date on the Personnel Action Request form. If the password is erroneously entered, the application displays a warning message. Users **must** use the "CLEAR" command button to delete previously entered passwords. To clear the "Password" block, select the "Name" block again, enter the correct password, and click the "clear" command button. If the "CANCEL" button is clicked, PERSACTION returns to Page One of the Personnel Action Request.

Action Authorized By. Users can complete this block if they have permission to authorize actions. Prior to forwarding any action to the personnel office, it must be authorized.

When users click this block, they receive the message **"Once this action has been authorized, no changes can be made to this form."** If the "Proceed" button is clicked, the application displays Figure 5-6, "Authorization Password" screen.

Figure 5-6. Authorization Password Dialog Box Screen

All users should review the entire Personnel Action Request before authorizing it. Users have the option to clear the authorization block if they later find it necessary to make changes to the authorized form. To clear the "Password" block, select the "Name" block again, enter a password, and click the "CLEAR" command button. After the block is cleared, users can modify the Personnel Action Request form and then authorize the action again when complete. If they click the "CANCEL" button, the system returns to Page One of the Personnel Action Request.

Part B - Preparation of the SF-50

Name and Social Security Account Number. The Social Security Account Number ("SSAN") and "Name" blocks are related. The "SSAN" block should be completed if the Personnel Action Request involves a current employee. The following steps are used to enter information from an employee's record into the Personnel Action Request form:

1. Place the cursor on the "SSAN" block. Click the "LIST" command button that is located at the bottom of the page. That action provides an alphabetical listing of employees in the organization, along with the employee's social security number, pay plan, series, and grade.
2. Click the scroll bar or use **[Arrow]** keys to locate an employee's record. A "Find" feature may also be used. To use that feature, enter the first few letters of the employee's last name and click on the "Find" command button. PERSACTION then highlights the first record containing an employee's last name beginning with those letters.
3. Click the selected employee's SSAN/Name line and then the "OK" button. The application then populates the SSAN, Name, and Date of Birth blocks on this page. It will also populate the organization, position, and employee blocks on the Personnel Action Request form. **The information in the Date of Birth block is visible only to a personnelist.**

If the employee's name is not found in the **<list>** dialog box, then the employee's name can be entered by the user. When entering the employee's name, periods and commas can not be used. DCPDS will not process the action.

Effective Date. This field is reserved for personnel office use only. Personnelists enter the month, day, and year that the action will be effective.

Page Two of the Personnel Action Request

This page is a continuation of Part B of the Personnel Action Request. Several of the blocks in this page are restricted for use by personnelists. Managers complete the “To Side” of Part B, only if the action establishes a new position.

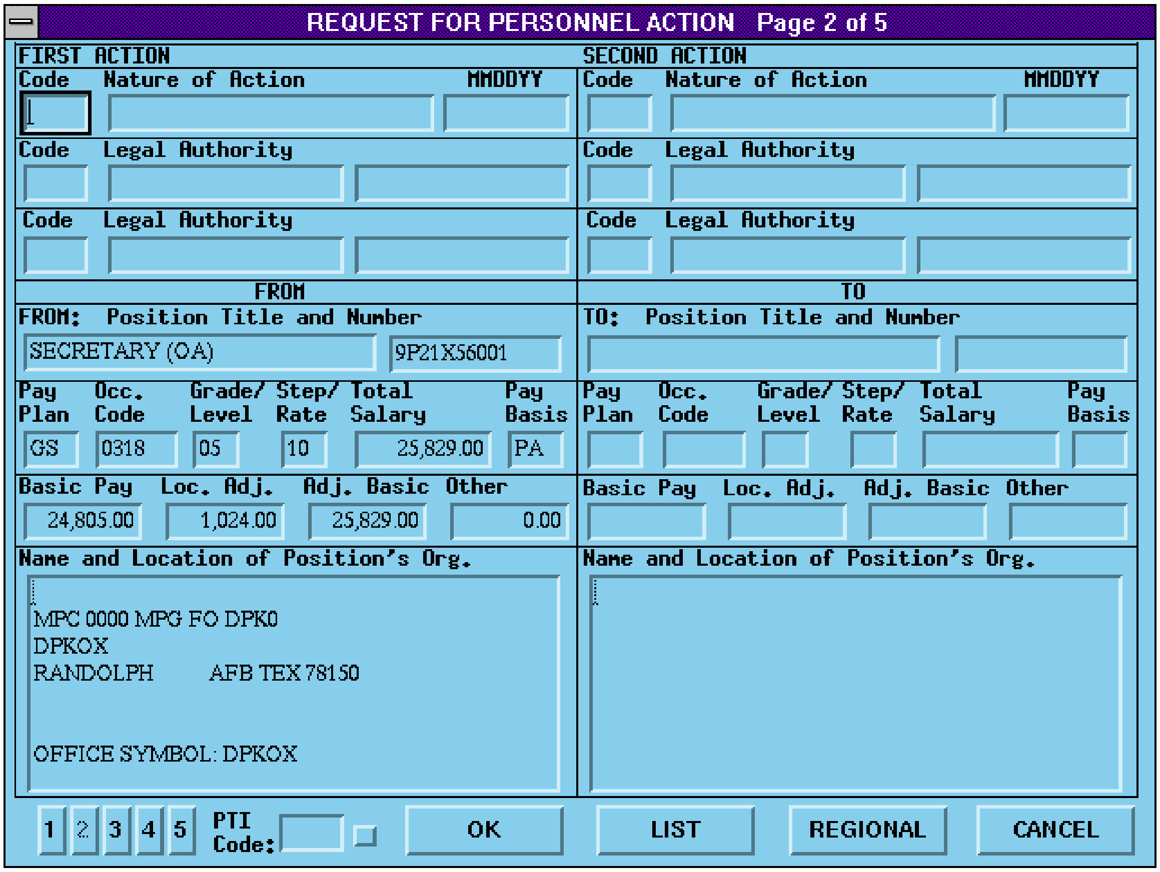

Figure 5-7. Request for Personnel Action, Page Two

Nature of Action and Authority Code Blocks

The Nature of Action and Authority blocks are reserved for Civilian Personnel Office use only.

If the Nature of Action Code (NOAC) is known, the personnelist enters a four digit code. The application then inserts the clear text from the DCPDS table, such as “0702” for “Promotion.” If the Authority Code is known, the personnelist enters a three digit code and the application displays the corresponding clear text. For example, if Authority Code "N6M " is inputted, the text Reg. 335.102 Career Prom. is displayed.

If either the NOAC or Authority is unknown, personnelists can click on the block and the application displays a help table containing a list of NOACs or Authority Codes with corresponding clear text. Then they can use the scroll bar to locate the appropriate Nature of

Action or Legal Authority, and click the “OK” button to insert the selection onto the Personnel Action Request.

“From Side” of the Personnel Action Request

The “From Side” of the Personnel Action Request contains the blocks for Position Title and Number, Pay Plan, Occupational Code, Grade/Level, Step/Rate, Salary blocks, and Name and Location of the Organization where the position is located.

If users select a SSAN/Name record from the list box, then the “From” information blocks are populated with information from DCPDS. If users request actions that do not involve a current employee, these blocks are left blank.

✓ Managers are not permitted to edit any of this information. If managers find information that is incorrect, they should annotate the correct information in “Remarks by Requesting Office” block on Page Four of the Personnel Action Request.

“To Side” of the Personnel Action Request

The “To Side” of the Personnel Action Request contains Position Title and Number, Pay Plan, Occupational Code, Grade/Level, Step/Rate, Salary, and Name and Location of the Position’s Organization.

✓ Personnelists assign permanent position description numbers, but managers may activate dialog boxes, as shown in Figure 5-8.

Completing the Position blocks. To pull information from DCPDS, click the Second (CPCN) block underneath the “TO: Position Title and Number” heading (Figure 5-7). PERSACTION then displays a screen asking users if they would like to choose from “Encumbered” or “Unencumbered” positions.

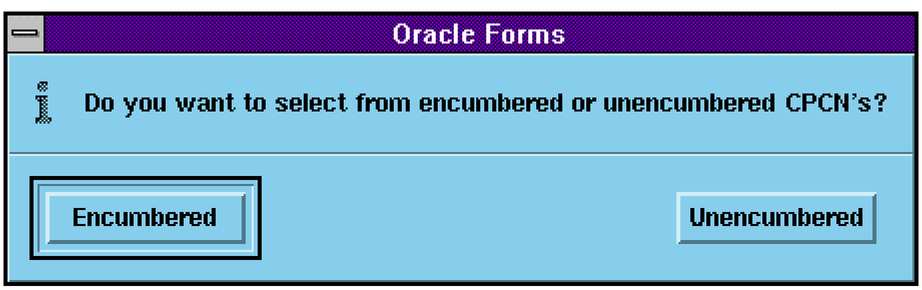

Figure 5-8. Oracle Forms Message Box Screen

When users indicate a selection, the application displays one of the screens shown in Figure 5-9.

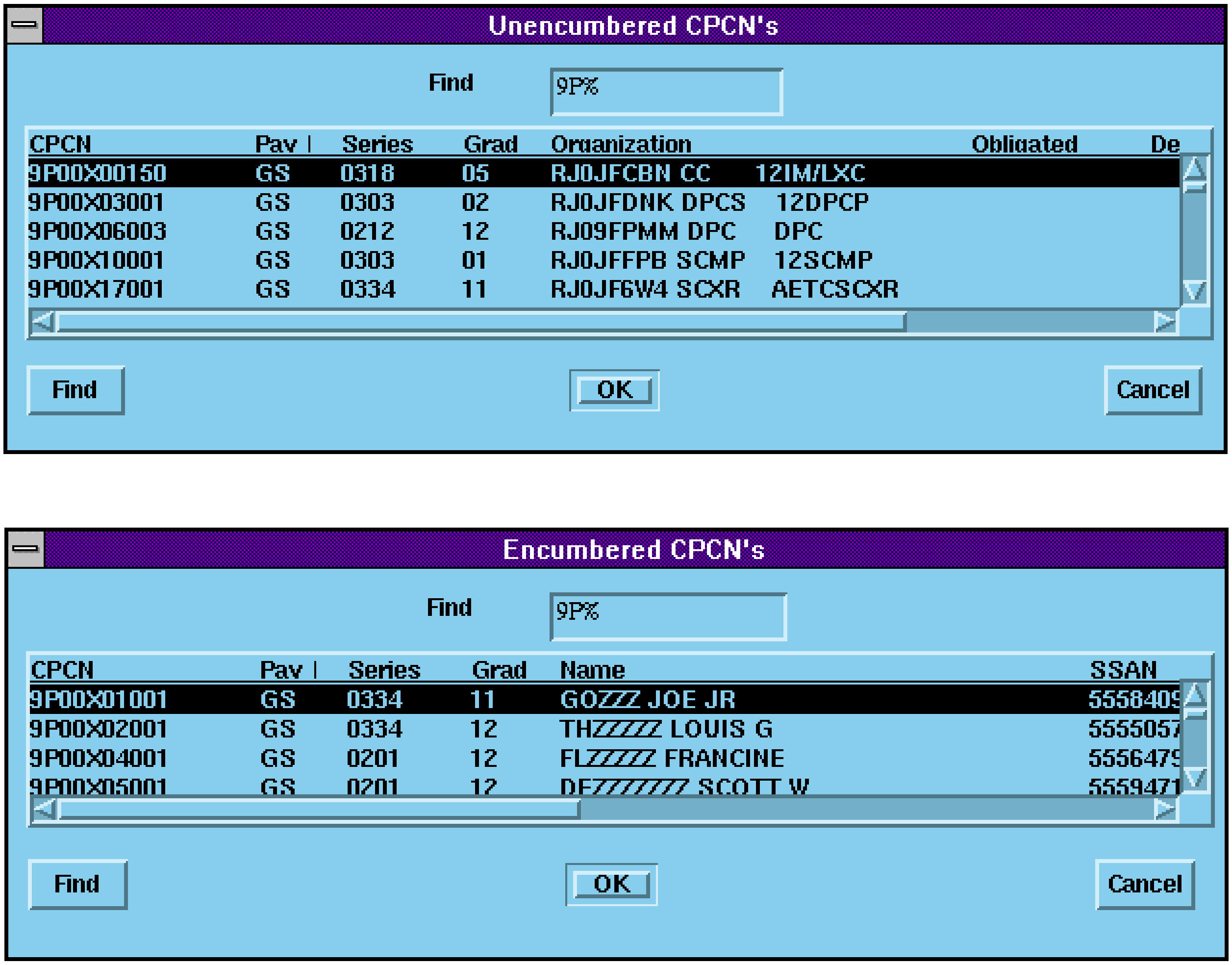

Figure 5-9. Encumbered and Unencumbered Position Dialog Boxes Screens

Positions are listed in numerical order by Civilian Position Control Number (CPCN). To view the entire list, scroll through the positions or use the "Find" feature to locate the position that is to be filled. Click the horizontal scroll bar to view additional information about the position. Highlight the position record and click the "OK" command button, which then populates the "To Side" of the form with data from DCPDS.

Using the "Find" Feature. Click the "Find" command button. The application then displays a "Find" dialog box. Move the cursor to the "Find" block and type part or all of the CPCN number before the percent sign. PERSACTION then highlights the first record that closely matches the data in the find block. Clicking the selection and then the "OK" command button inside the dialog box pulls the selection onto the Personnel Action Request.

Establishing a New Position. To establish a new position, users need to provide all position information, including Position Title, Pay Plan, Occupational Code, Grade, and Step. The Name and Location of the Organization in which the new position is being established must be completed using the "LIST" feature. The list shows all organizations that are established in DCPDS and associated with the users' organizational component.

Name and Location of Position's Org. The Organization Dialog Box (Figure 5-10) is **automatically** generated when the "Name and Location of Position's Org." block on the form is selected.

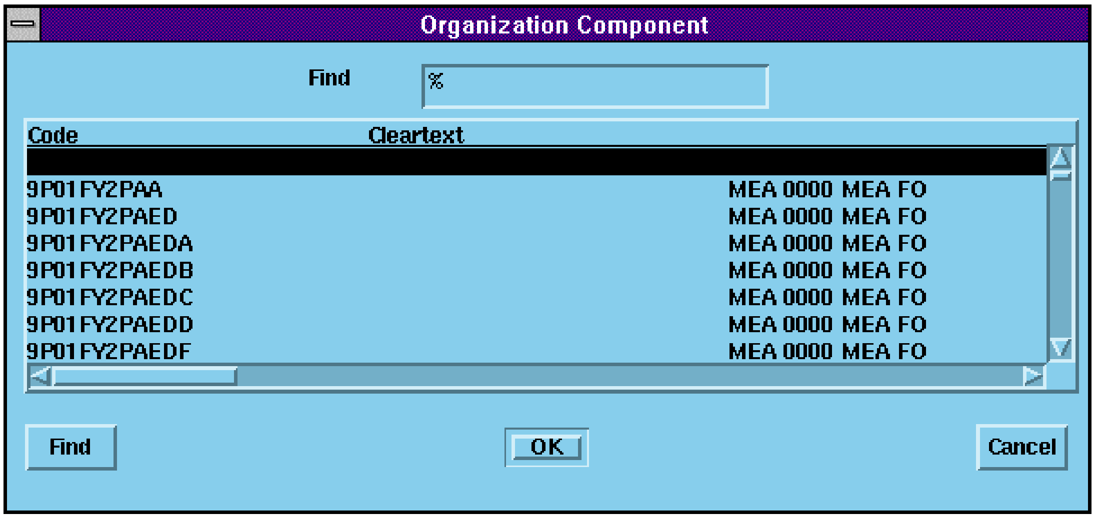

Figure 5-10. Organizations Dialog Box Screen

Organizations are shown in organization component order. To locate an organizational component, use either the scroll bar or "Find" feature. Once the organization has been located and highlighted, click "OK" to select it. The application will automatically complete the required position data and organizational information from the reference table in DCPDS.

Establishing a New Organization. If the organizational component is not found in the "LIST" box, users must annotate the name of the new organization in the "Remarks by Requesting Office" block on Page Four of the Personnel Action Request. In addition, the manager should forward a copy of the staffing and manning document via fax or E-mail to the appropriate offices for approval.

Page Three of the Personnel Action Request

This page is a continuation of Part B of the Personnel Action Request and is divided into two sections -- EMPLOYEE DATA and POSITION DATA (Figure 5-11).

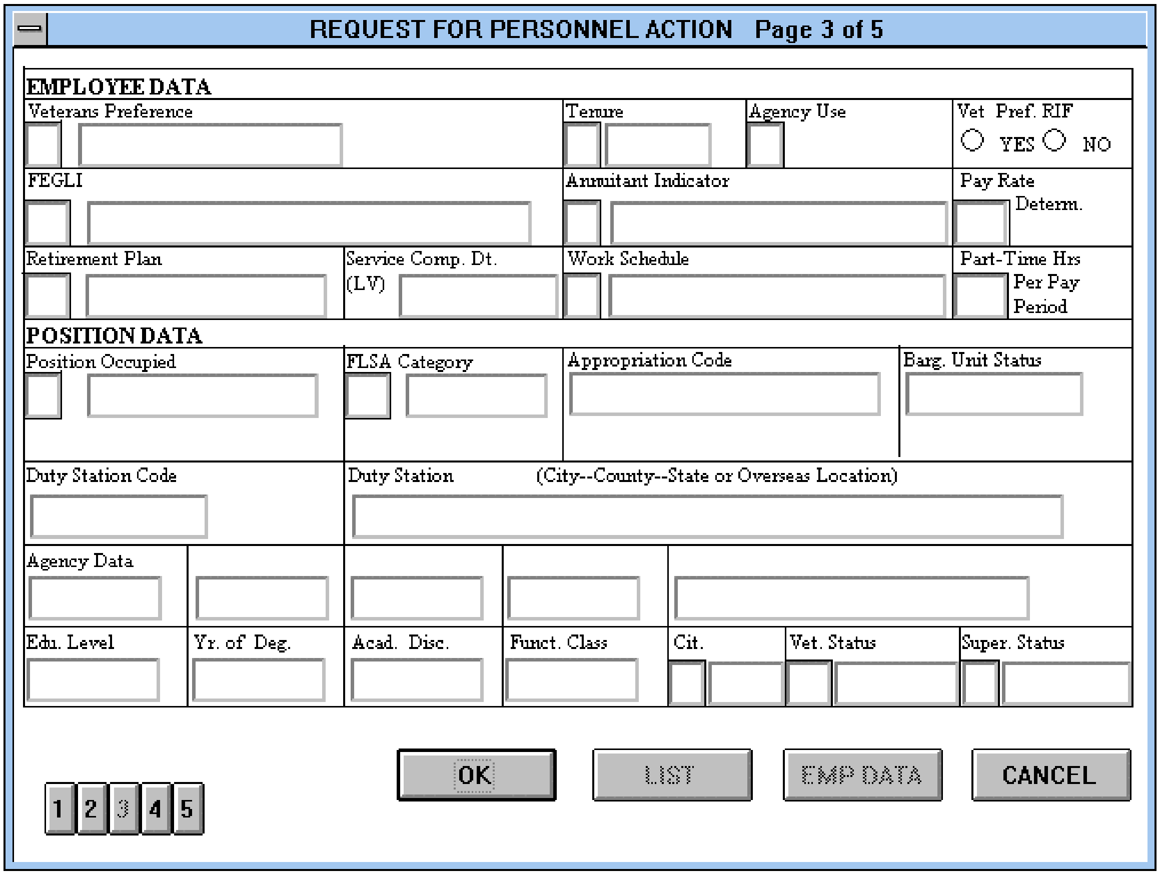

Figure 5-11. Request for Personnel Action, Page Three

If the personnel action pertains to an employee currently in the application, the blocks on this page are automatically populated with employee and position data from DCPDS.

To edit these data, place the cursor in the block of data that is being edited. Click the "LIST" command button to create a dialog box containing a list of appropriate values for the block. To select a value, highlight the desired code and click the "OK" command button.

Employee Data

The Employee Data section contains Veterans Preference; Tenure; Agency Use; Veteran Preference for Reduction in Force (RIF); Federal Employees Group Life Insurance (FEGLI); Annuitant Indicator; Pay Rate Determinant; Retirement Plan; Service Computation; Date; Work Schedule; and Part-Time Hours per pay period. Managers have access to the Work Schedule and Part-Time Hours blocks, while personnelists can enter data into any of the Employee Data blocks. A Help window is available for each block and is accessible by moving the cursor to it and then clicking.

Veterans Preference. This block indicates an employee's category of entitlement to preference in the Federal Service based on Active Military Service that was terminated honorably. It is populated from DCPDS for actions pertaining to a current employee, or if the user identified a position on the "To Side" of the form. **This field can only be completed by the Civilian Personnel Office.** Click this block to provide personnelists with a dialog box and a **<list>** option.

Tenure. This block identifies the nature of an employee's appointment and is used to determine the employee's rights in a RIF. **This block can only be completed by the Civilian Personnel Office.** Clicking this block provides personnelists with a dialog box and a <**list>** option.

Agency Use. For activities using this block, the application creates a dialog box containing a **<list>** option. **This block can only be completed by the Civilian Personnel Office.**

Vet Pref. RIF. This block indicates whether an employee has preference for RIF purposes. **This block can only be completed by the Civilian Personnel Office.** Clicking this block provides personnelists with a dialog box containing a **<list>** option.

FEGLI. This block indicates whether an eligible employee elected to retain a FEGLI. **This block can only be completed by the Civilian Personnel Office.** Clicking this block to provides personnelists with a dialog box containing a <**list>** option.

Annuitant Indicator. This block indicates the status of an annuitant appointment to a Federal civil service position. **This block can only be completed by the Civilian Personnel Office.** Clicking this block provides personnelists with a dialog box containing a **<list>** option.

Pay Rate Determ. The Pay Rate Determinant block indicates a designator of special factors that help determine an employee's rate of pay. **This block can only be completed by the Civilian Personnel Office**. Clicking this block provides personnelists with a dialog box containing a **<list>** option.

Retirement Plan. This block indicates the type of retirement plan, if any, that an employee is enrolled, such as the Federal Employees Retirement System (FERS). **This block can only be completed by the Civilian Personnel Office.** Clicking this block provides personnelists with a dialog box containing a **<list>** option.

Service Comp. Dt (LV). The Service Computation Date for Leave block indicates when the employee began working for the Federal government, unless the employee has prior creditable service. If an employee has prior creditable service, this date is constructed to include the total years, months, and days of prior creditable civilian and military service. **This block can only be completed by persons in the Civilian Personnel Office.**

Work Schedule and Part-Time Hours Per Pay Period. These blocks show an employee's work schedule and indicate the number of hours a part-time employee is scheduled to work during a two-week pay period. Data can be entered in these fields if a manager or a personnelist is requesting the establishment of a new position or changing an employee's work schedule.

These blocks are populated from DCPDS for actions pertaining to a current employee, or if users identify a position on the "To Side" of the form. Users cannot change the data in the Work Schedule or Part Time Hours blocks if the "Actions Requested" block on Page One does not read "Change in Duty Hours".

Position Data

Position Occupied. The Position Occupied block identifies the employment system under which the employee is serving, such as the Competitive Service, Excepted Service, or Senior Executive Service. It is populated with data from DCPDS for actions pertaining to current employees within an organization. For newly established positions, click this block and the application displays a dialog box containing a **<list>** of values.

FLSA Category. The Fair Labor Standards Act (FLSA) Category block indicates if an employee's position is covered by the minimum wage and overtime law (i.e., FLSA). Clicking this block provides personnelists with a dialog box containing a **<list>** option.

Appropriation Code. This block is populated with data from DCPDS for actions pertaining to a current employee. Users can complete this block when the "Action Requested" block reads: "FILL/RECRUIT" position. If users want to change this information, they need to indicate the reasons for the modification in the Remarks by Requesting Office Block on Page Four. If the "LIST" button is not dimmed, users are provided with a dialog box containing a **<list>** option.

Barg. Unit Status. The Bargaining Unit Status block identifies a bargaining unit to which an employee belongs, whether or not that employee is actually a member of a labor organization. **This block can only be completed by the Civilian Personnel Office.** To edit this block, click the "Barg. Unit Status" block and then the "LIST" command button. A dialog box containing a list of appropriate values for this block then appears on the screen. To select a value, highlight the desired code and click the "OK" command button.

Duty Station Code and Duty Station. These blocks are populated with data from DCPDS if the user has requested an action on a current employee. Users can complete this block when the "Action Requested" block reads: "FILL/RECRUIT Position." To enter data on the form, click the "Duty Station Code" block and then on the "LIST" command button. From the **<list>** dialog box, users may either scroll through the list or use the "Find" feature to locate the appropriate code and clear text. When users highlight "Duty Station" and click the "OK" command button, the information is automatically entered in the appropriate blocks.

Agency Data

Agency Data blocks 40 through 44. These blocks are normally used to add position or pay information not found on the Personnel Action Request form. The information in these blocks generally will vary based on the user's DoD Component or Agency. These blocks do not have help screens and personnelists should refer to local instruction for completing them.

Educational Level, Year of Degree, and Academic Discipline Blocks. These blocks identify information pertaining to an employee's education. **They can only be completed by the Civilian Personnel Office.** To edit these blocks, click the block and then the "LIST" command button, which creates a dialog box containing a **<list>** of appropriate values for the block. To select a value, highlight the desired code and click the "OK" command button.

- The "Educational Level" indicates the extent of an employee's education at a formal academic institution.
- The "Year of Degree" block indicates the calendar year during which an employee received the degree shown in the "Education Level" block.
- The "Academic Discipline" block indicates an employee's major field of study at an institute of higher learning. This block is applicable only if the degree received is a bachelor degree or higher.

Funct. Class. The Functional Classification block identifies whether the position entails a primary work function of either a scientist or engineer. **This block can only be completed by the Civilian Personnel Office.** To edit this block, personnelists may click the "Funct. Class" block and then the "LIST" command button, which creates a dialog box containing a **<list>** of appropriate values for the block. To select a value, highlight the desired code and click the "OK" command button.

Cit. This block indicates whether an employee is a citizen of the United States. **This block can only be completed by the Civilian Personnel Office.** To edit this block, click the "Cit." block and then click the "LIST" command button. The resulting dialog box contains a **<list>** of appropriate values for this block. To select a value, highlight the desired code and click the "OK" command button.

Vet. Status. The "Veterans Status" block indicates whether an employee is a veteran as defined by 38 USC 101 (a person who served in active uniform military service of the United States and received a separation from the service under condition other than dishonorable). Employees may be coded as veterans in this block even though they may not qualify for veteran's preference under 5 USC. **This block can only be completed by the Civilian Personnel Office.** To edit this block, click the "Vet. Status" block and then the "LIST" command button. A dialog box containing a list of appropriate values for the block then appears on the screen. To select a value, highlight the desired code and click the "OK" command button.

Super. Status. The "Supervisory Status" block identifies whether the employee's position is managerial, supervisory, or nonsupervisory. **This block can only be completed by the Civilian**

Personnel Office. To edit this block, click the "Super. Status" block and then the "LIST" command button. A dialog box containing a list of appropriate values for this block then appears on the screen. To select a value, highlight the desired code and click the "OK" command button.

Page Four of the Personnel Action Request

Page Four of the Personnel Action Request contains two parts -- C and D (see Figure 5-12). Part C is used by Civilian Personnel Offices to document the personnel who review the Personnel Action Request form. Part D is used by supervisors and managers to enter additional or conflicting reasons for employee resignations/retirements, or to annotate special circumstances surrounding the processing of the action.

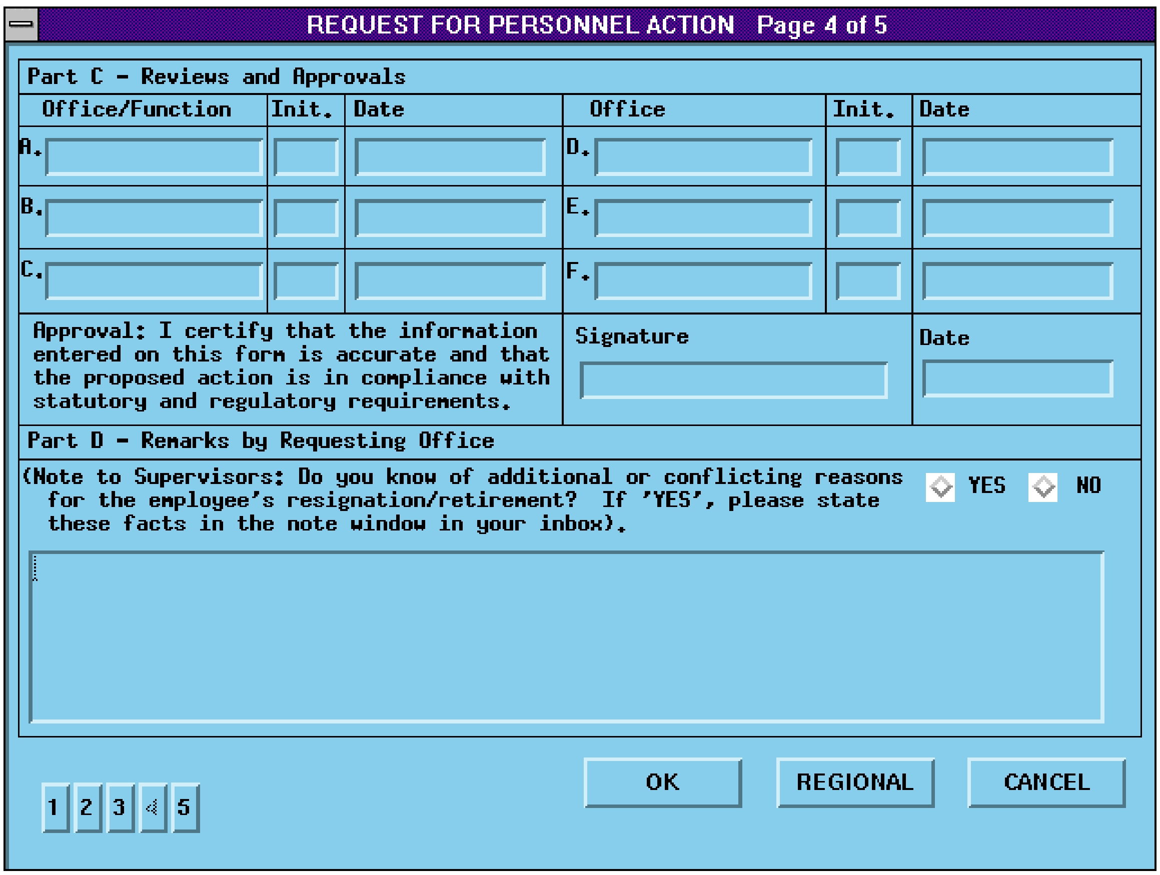

Figure 5-12. Request for Personnel Action, Page Four

Part C - Reviews and Approvals.

All fields in this part of Page Four are reserved for personnelist use.

Reviews. Personnelists use these blocks to indicate reviews and clearances for a Personnel Action Request. The Personnel Action Request form allows for six levels of review within the Civilian Personnel Office. Clicking any block (A through F) displays the dialog box shown in Figure 5-13.

Figure 5-13. Approval Password Dialog Box with Office/Function

To use Part C, personnelists enter their password and press the **[Tab]** key to move the screen pointer to the "Office/Function" block. Then type an alpha-numeric code or name for their office. PERSACTION displays the office symbol, personnelist's initials, and system date for the desired block. Users may return to the previous page by clicking the "CANCEL" command button, while clicking the "CLEAR" command button removes the user's password from the password block.

Approval of the Personnel Action Request. Personnelists may approve a Personnel Action Request form by clicking the signature block, which results in the screen shown in Figure 5-15.

Figure 5-14. Approval Password Dialog Box

To enter a password, personnelists must type their password into the block provided in the dialog box. To complete the approval of the Personnel Action Request, they **must** click the "OK" Command Button.

✓ After the password is entered in the block, personnelists may use the "CLEAR" command button to reenter their password. Clicking the "CANCEL" command button returns the application to Part C of the Personnel Action Request form.

Part D - Remarks by the Requesting Office

This block is used to enter additional remarks that are important to the resource management or personnel office staff. For example, it could be used to document changes to Work Schedules, Appropriation Codes, or Duty Station Codes; or to document the amount and type of award, if an award is requested. Managers may use this block to recommend recruitment sources or document whether relocation services may be used for filling a position outside the commuting area.

Page Five of the Personnel Action Request

Page Five of the Personnel Action Request consists of two parts -- E and F (see Figure 5-15). Part E is used to document the reasons for an employee's resignation or retirement, while Part F is used by the personnel office to make remarks that appear on the SF-50 form.

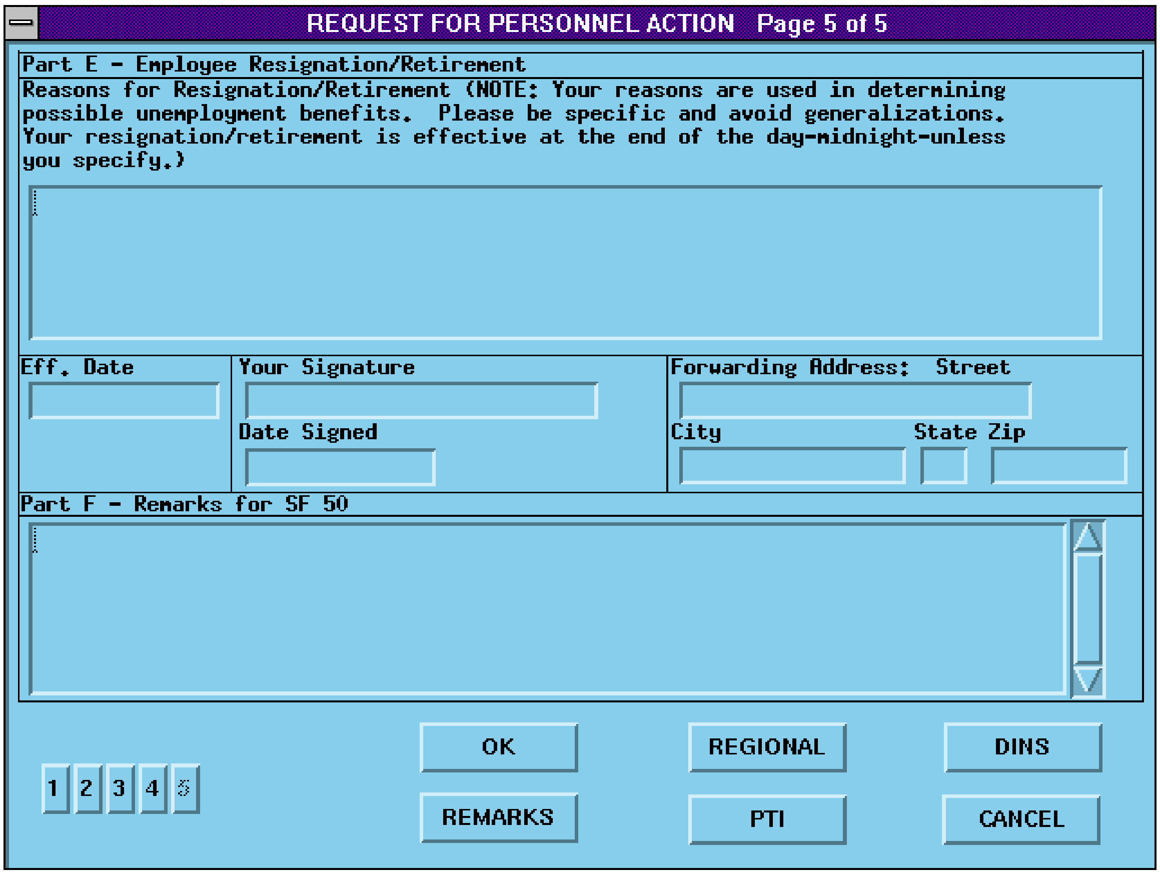

Figure 5-15. Request for Personnel Action, Page Five

Part E - Employee Resignation/Retirement

When a manager or personnelist is processing a request for resignation or retirement for an employee, they should complete Parts A through D of the form, print those parts, and have the employee complete and sign Part E of the form. The signed Personnel Action Request form should then be forwarded to the Civilian Personnel Office.

Users should indicate in Part D that they are forwarding the hard copy separately. Either the manager or employee should include the following information in Part D: Employee's Reason for Resignation, Effective Date, Forwarding Address for the Employee, and Proposed Effective Date of the action.

Part F - Remarks for the SF-50

This part is reserved for Civilian Personnel Office use only. Chapter Eight describes the procedures for completing the "Remarks for the SF-50" section. Personnelists should refer to Chapter Eight for guidance on creating a PTI, transmitting the PTI to DCPDS, and closing a Personnel Action Request in the Action Tracker.

List Actions

PERSACTION provides users with the capability to create a single Personnel Action Request (known as a List Action) for several actions that apply to more than one employee. Those actions include Realignment (NOAC 790), Time-Off Award (NOAC 872), Special Act or Service Award (NOAC 877), and Performance Award (NOAC 872). The List Action routines were designed to provide users with the capability of processing hundreds of employee records at one succession, while minimizing the number of required keystrokes. For illustration purposes, we will discuss how to create a Time-Off Award.

Creating an Award Action

To create a List Action for a Performance, Time-Off, or Special Act or Service Award, click the "CREATE" command button located in the In Box (see Figure 4-1). The application then creates the screen shown in Figure 5-1. Select the Personnel Action Request form. Click the first option and then the "OK" command button. The **"**CANCEL**"** command button returns the application to the In Box. The application then automatically displays the "Actions Requested Type" dialog box (See Figure 5.4).

Using the scroll bar, locate the List Action by selecting "Award" from the dialog box. Highlight the "Actions Requested" type and click the "OK" command button to display a second dialog box containing a list of Award Actions. If Performance, Time-Off, or Special Act or Service Award is clicked, the application displays the "Transaction Type" dialog box shown in Figure 5-16.

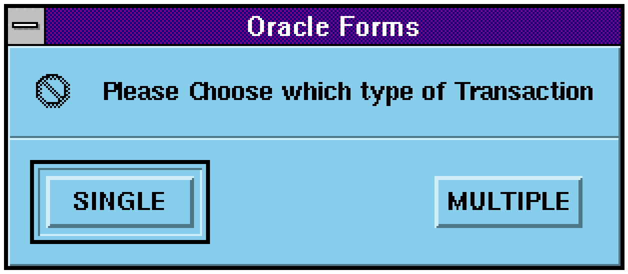

Figure 5-16. Transaction Type Dialog Box

To select a List Action, click the "Multiple" button and then the "OK" command button. Click "OK" to insert the Actions Requested Type into the appropriate block and insert the word "MULTIPLE" into the "SSAN" block on Page One of the Personnel Action Request.

The application then notifies the user of any required inputs, such as "Award Amount" for Performance Award or Special Act Award, or "Total Hours" for a Time-off Award.

Click the "SSAN" block to display the List Action screen for the type of award action selected. Each List Action screen contains a header, vertical scroll bar, and five command buttons. Figure 5-17 shows the List Action Screen for a Time-Off Award.

The Header contains two sections, "DISPLAY INFORMATION" and "INPUT DATA". The information contained in the "DISPLAY INFORMATION" section includes social security number, name, grade, pay plan, pass code, organization code and organization component. The information contained in the "INPUT DATA" section includes effective date, authority, award agency, and SF-50 authorization signature.

The Social Security Number, Name, Pay Plan, Grade, Organization Code, Pass Code, Organization Component, and the Amount of Time Off blocks will vary depending on the employee record that is highlighted on the screen. The application indicates that a record is selected by filling in the check box next to an employee's record.

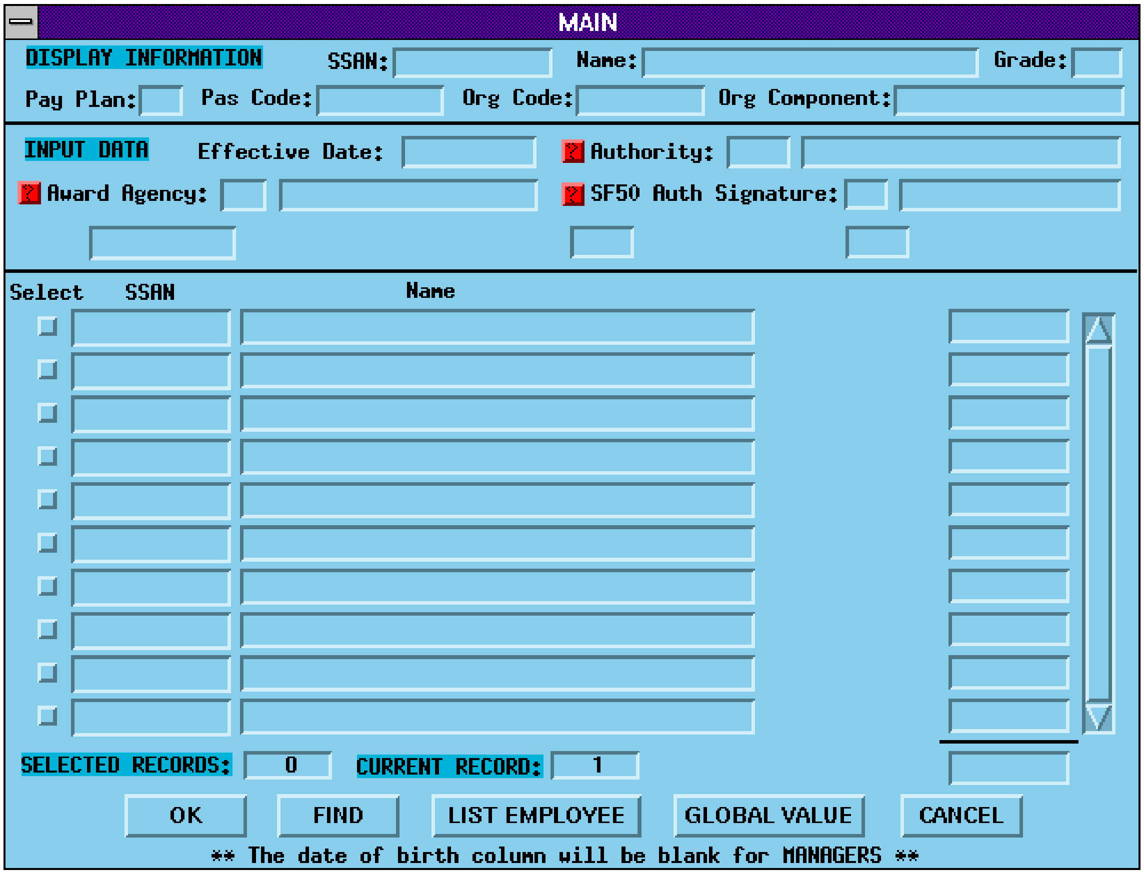

Figure 5-17. Time-Off Award Screen

To edit the Time-Off Award screen, users must first go to the “INPUT DATA” section of the form. Enter the Effective Date for the action, e.g., 10-24-97. Go to the “Agency Code” block and click the question mark “?” button located to the left-hand side of the block. The application will display an “Agency Code” dialog box (Figure 5-18) containing a listing of two-digit code (e.g., “AF” for Air Force).

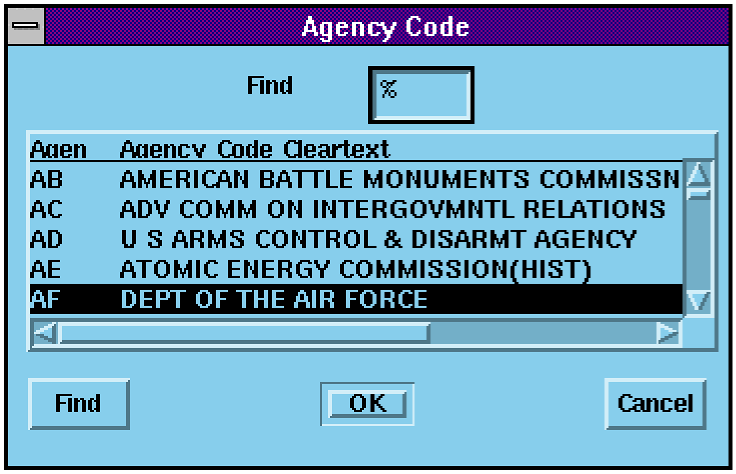

Figure 5-18. Agency Code Dialog Box

Use the mouse or the “find” feature to highlight the desired code and press the “OK” button. After the agency code is entered into the Time-Off Award screen, users can begin entering individual employee records.

Click the “LIST EMPLOYEE” button and the application will display the “Employee Select Criteria” dialog box (Figure 5-19). Users have the option to view a list of employees by organization component, organization structure identification (i.e., Organizational Code), Office Symbol, Pass Code, or all employees.

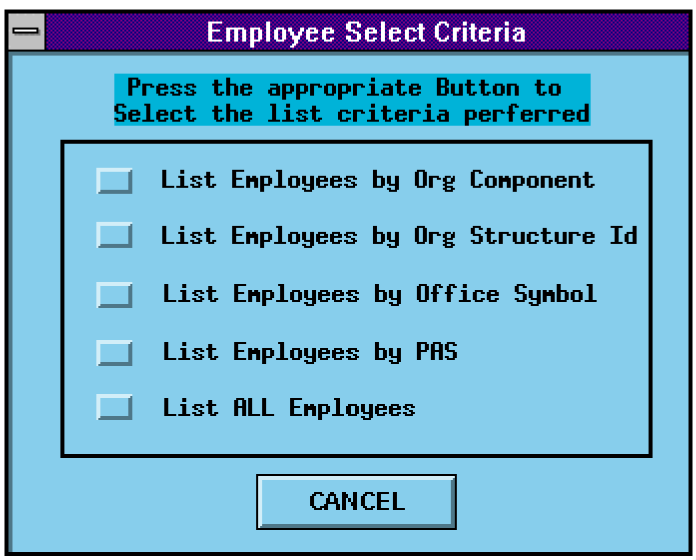

Figure 5-19. Employee Select Criteria Dialog Box

For illustration purposes, the user selects “List Employees by Org Component” by clicking the button adjacent to the option. The application will then display the “Selected the Organization Component” dialog box (Figure 5-20).

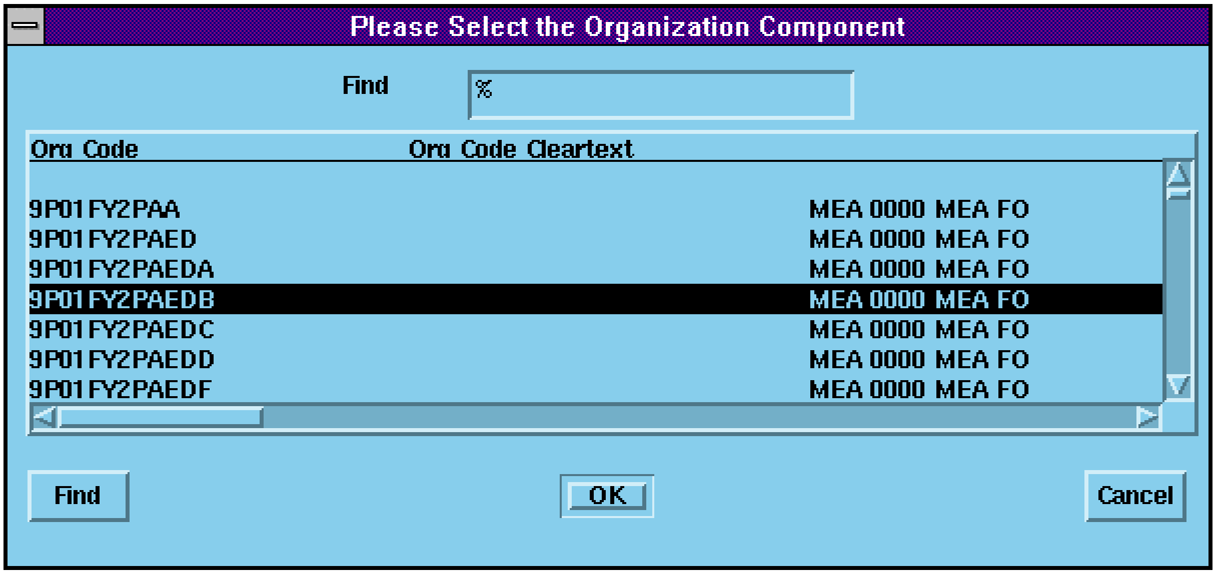

Figure 5-20. List Employees by Organization Component Dialog Box

Once the selection criteria has been selected, e.g., all employees in org component 9P01FY2PAED, the user will have a new revised SELECT window. The Select Employee for Award Screen contains four buttons, "OK", "SELECT ALL", "UNSELECT ALL", "FIND", and "CANCEL". There is a box within the screen that tells users how many employees match the selection criteria. The first button (total count) indicates how many employees are in the database. The other button (select count) tells how many employees have been selected. A "Current" number block at the top left corner of the window indicates which record the cursor resides on. A "SELECT" button will process against all the records in the "Select Employees" screen.

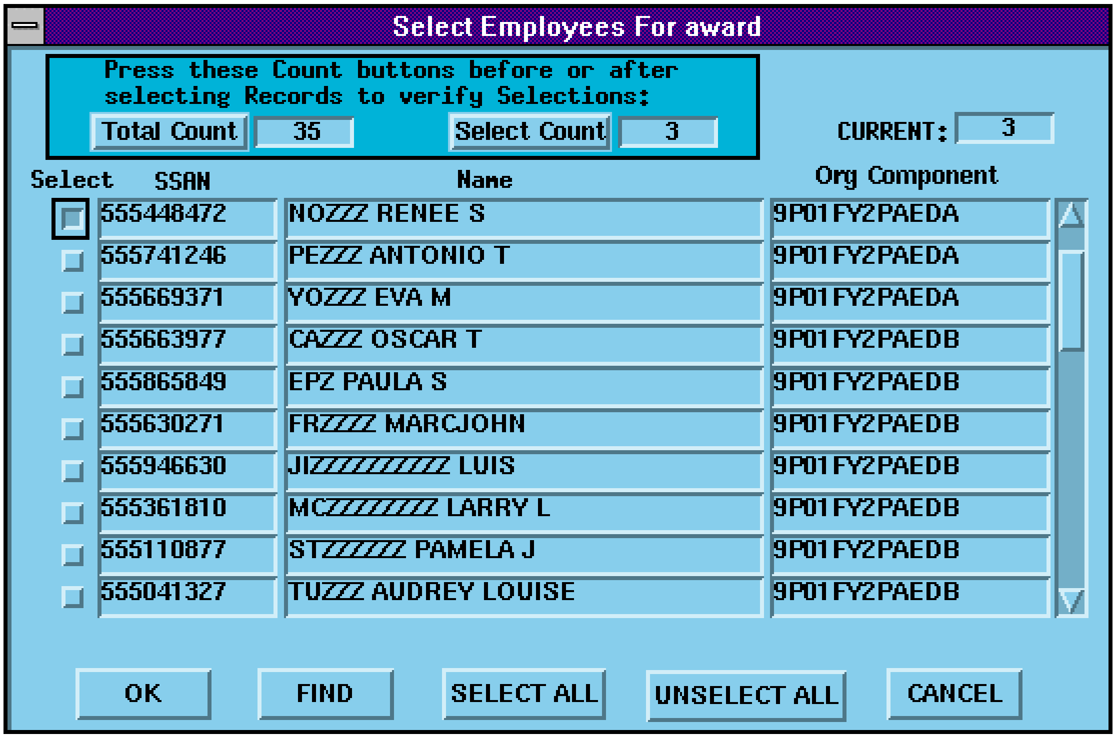

Figure 5-21. Select Employees Screen

When clicking a button, the form will now provide either a cursor hour glass or a message that informs the user, “Selecting all records, please wait”. The command buttons will be disabled while the application is processing the user’s request and become activated upon completing the search of the database. This feature prevents users from inadvertently pressing a button while the application is processing the request.

There is also a “FIND” button that allows users to locate a name or SSAN in the pool of records. To use that option, click the “FIND” command button. The application then displays a “Find Records” dialog box (Figure 5-22) containing the “Name/SSAN” blocks and the “OK” and “CANCEL” buttons.

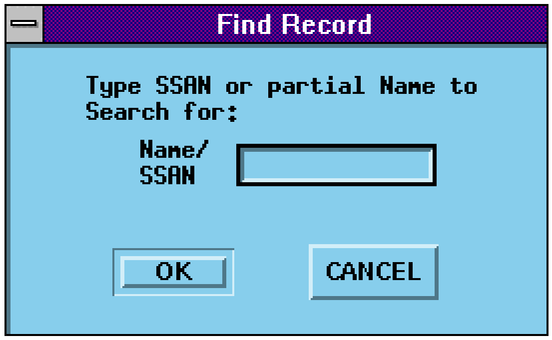

Figure 5-22. Find Record Dialog Box

To locate an employee's record, move the cursor to the "Name/SSAN" block. Users may also enter all or part of the employee's last name and then click the "OK" button. If the user has access to an employee's social security number, the application will insert that employee's data into the Award screen.

Entering the Amount of the Award. After the names are inserted on the Award screen, click the "SSAN" block to highlight an individual record. Users may enter either the "Amount of Time Off" or "Award Amount" by placing the cursor in the block. Users may then enter an amount for the award and press the **[Enter]** key to insert the value on the screen. Repeat this process to enter an award amount for every employee record on the screen.

Users may also enter the same amount for each SELECTED employee by clicking the "Global Value" button. This feature allows users to input a particular value, e.g., "10" hours, and the application will automatically enter that value for every SELECTED employee.

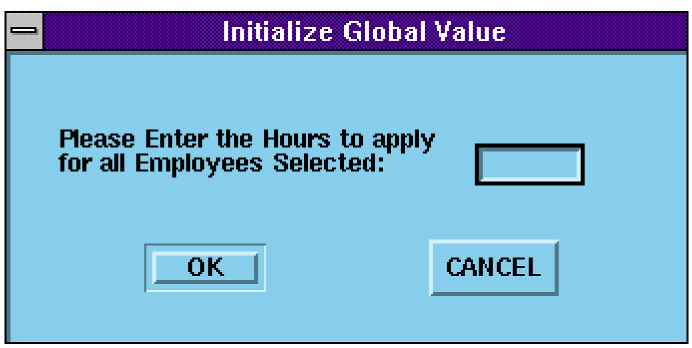

Figure 5-23. Initialize Global Value Dialog Box

After the value is entered, click the "OK" button. Click the "CANCEL" button to enter individual hourly amounts for each employee's record.

After the user has completed all the blocks on the Time-Off Award Screen, the application will display the Nature of Action and the Personnel Action Request Number in the Title Bar of the Screen.

For illustration purposes, Figure 5-24 shows that five employees have been selected for a Time-Off Award of 10 hours, effective 10-06-96.

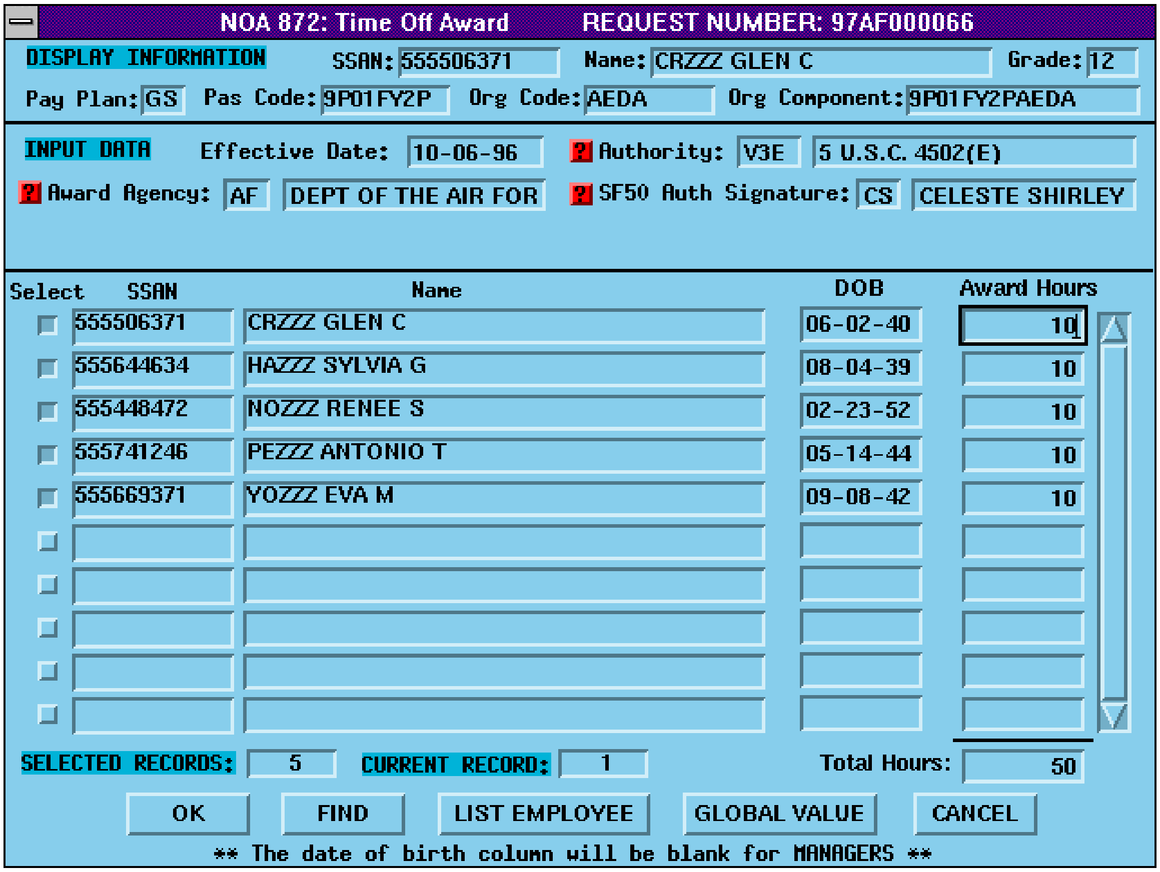

Figure 5-24. Time Off - Award Screen

After the last employee record is inserted, click the “OK” command button to return to Page One of the Personnel Action Request.

CHAPTER SIX: COORDINATING AND TRACKING ACTIONS

This chapter describes the "Coordination" and "Tracking" features found in PERSACTION.

The "Coordination" feature supports passing an action to a different group or functional area. Personnel Action Requests are coordinated when another user needs to take a particular action regarding the request. PERSACTION provides a note window so that the new user can insert specific remarks concerning the action. Additionally, users now have the capability to create a default coordination sheet.

The "Tracking" feature enables a user to track actions that were coordinated to another group or functional area. Once an action is coordinated, the Action Tracker is updated to indicate that the action has been coordinated to another group. PERSACTION also contains a Personnel Action Request Tracking Report and a Group Status Report. Those reports are discussed in Chapter Seven, "Reports."

Coordination Function

When an action is coordinated, the tracking module is updated to indicate that the action has been coordinated or passed to another user (group). Once an action is coordinated, the originating user may view, print, and track it by accessing the Action Tracker.

To access the “Coordination” option, click the “COORDINATE” command button found at the bottom of the In Box (see Figure 6-1). The application then provides the user with two options. The first option allows the user to create a route slip for a single action and then forward the action to the first person on the route slip. The second option allows users to select multiple personnel actions for coordination to specified person or to the next person on the route slip.

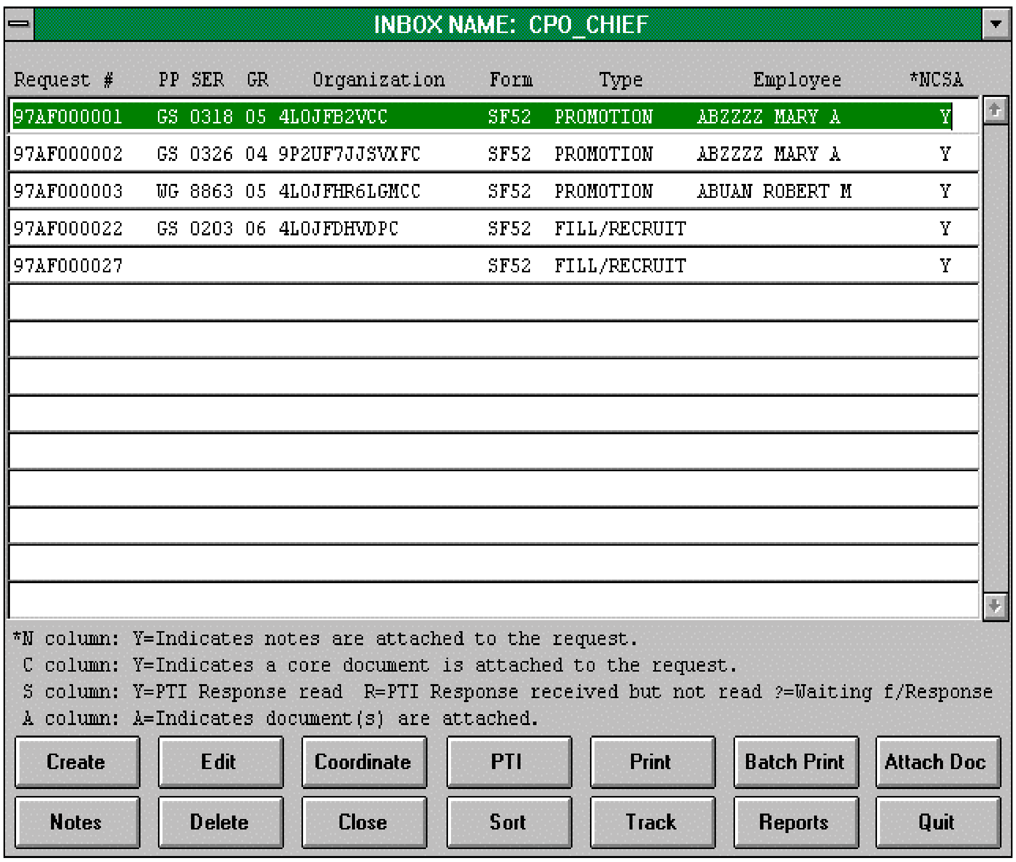

Figure 6-1. User’s In Box Screen

Coordinating a Single Action

The “Coordination” option allows an individual user to create a route slip for the action and then forward the action to the first person on the route slip. The original action is then moved to the recipient's In Box. Subsequent recipients of the action may move the action to the next addressee on the list, return the action to the originator, or insert a new addressee.

To access the screen, click the “COORD” command button found at the bottom of the In Box (see Figure 6-1). The application will display the “Coordination Options” Dialog Box shown in Figure 6-2.

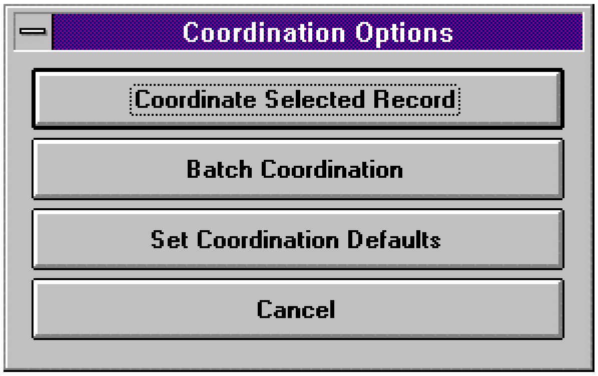

Figure 6-2. Coordination Options Dialog Box

The “Coordination Options” dialog box contains four options, “Coordinate Selected Record”, “Batch Coordination”, “Set Coordination Defaults”, and “Cancel”.

- **Coordinate Selected Record.** This option allows the user to select a single Personnel Action Request for coordination to another addressee’s In Box (see Figure 6-3).

- **Batch Coordinate.** This option allows the user to coordinate two or more Personnel Action Requests to another addressee’s In Box. Users should refer to “Coordinating Multiple Actions” later in this chapter.

- **Set Coordinations Defaults.** This option allows the user to establish a default routing slip. Users should refer to “Setting a Default Routing Slip” later in this chapter.

- **Cancel.** This option allows the user to return to their In Box without coordinating the action.

If the user selects “Selected Record”, the application will display the “Coordination” screen shown in Figure 6-2. Click the “Cancel” button to return to User’s In Box.

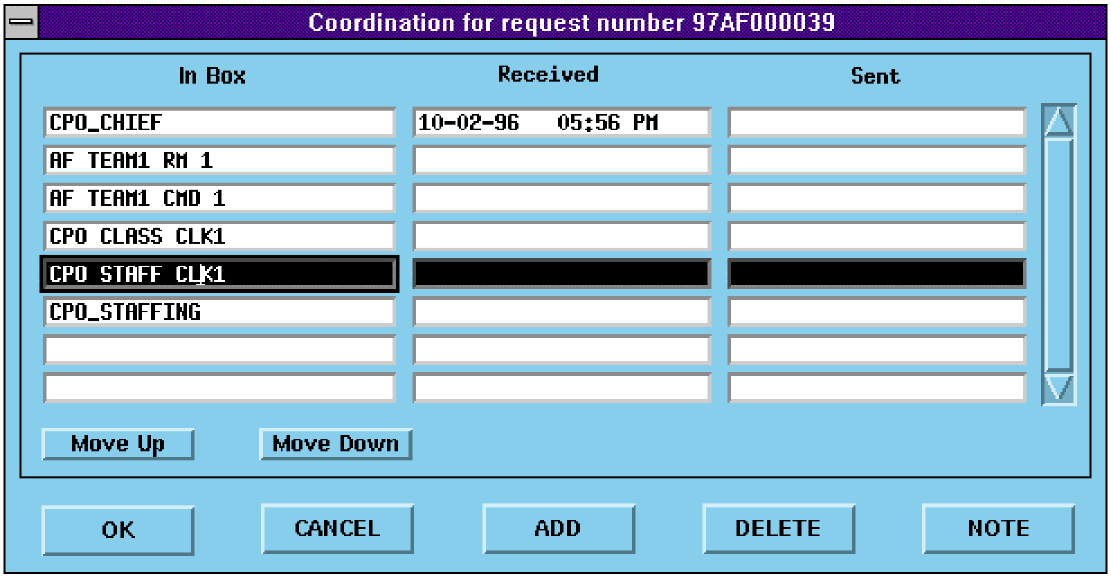

Figure 6-3. Coordination for Request Number 97AF000039

Figure 6-3 shows the "Coordination" screen. This screen enables users to view the list of previous addresses and comments concerning the action. A user may also move the selected action to another PERSACTION user; add names to the list; delete names; and review and/or add notes for the record. The screen contains three columns -- "In Box," "Received," and "Sent" -- and a scroll bar and five command buttons. The "In Box" column describes the addressee's name, code, or function, while the "Received" and "Sent" columns are generated by the application. The "Received" column contains the month-day-year and the time that the user received the action. The "Sent" column displays the month-day-year and the time the action was sent to another In Box.

The following command buttons are located at the bottom of the "Coordination" screen:

- **Move Up.** This feature allows users to rearrange the list of addressee's on the route slip. This button will be disabled if the cursor is on the first name on the route slip.

- **Move Down.** This feature allows users to rearrange the list of addressee's on the route slip. This button is disabled if the cursor is on the last record on the route slip.

- **OK.** Clicking the "OK" command button enables users to send an action to the next addressee on the list. The application then returns the senders to their In Box. It also moves the action to the next addressee's In Box. As mentioned earlier, at this point, the action is no longer in the current user's In Box.

- **CANCEL.** This feature allows users to cancel all modifications made to the route slip and then return to their In Box. The action remains in the user's In Box until the steps necessary to coordinate it to another user are completed.

- **ADD.** This feature allows users to add one or more addressees to the route slip. The user may also insert a new addressee on the route slip. Users should refer to "Adding an Addressee to the Route Slip" section later in this chapter.

- **DELETE.** This feature allows users to delete an addressee record from the route slip. Users should refer to "Deleting an Addressee Record" section in this chapter.

- **NOTE.** This feature allows users to view or modify notes regarding the selected personnel action request. Users should refer to "Adding Notes" section later in this chapter.

Creating a Route Slip

To create a route slip, click the line containing the request action and then click the "COORDINATE" command button at the bottom of the In Box screen. The application then displays the "Coordination Options" dialog box shown in Figure 6-2. Click "Coordinate Select Record" button and the application will display the "Coordination" screen (Figure 6-3). To add an addressee to the route slip, click the "ADD" command button. After clicking this button, the application displays a dialog box containing a list of current users.

Adding a Record to a Route Slip

Figure 6-4 shows an "Add Coordination Records" dialog box containing two sections; "Select/Find" and "Selected In Boxes" windows; scroll bars; and three command buttons: "OK", "Cancel", and "Track". The "Add Coordination Record(s)" dialog box is used to add employee(s) to the single coordination or default coordination sheets. Records are added by clicking the "In Box" or "People" check boxes located at the top of the "List/Find" window.

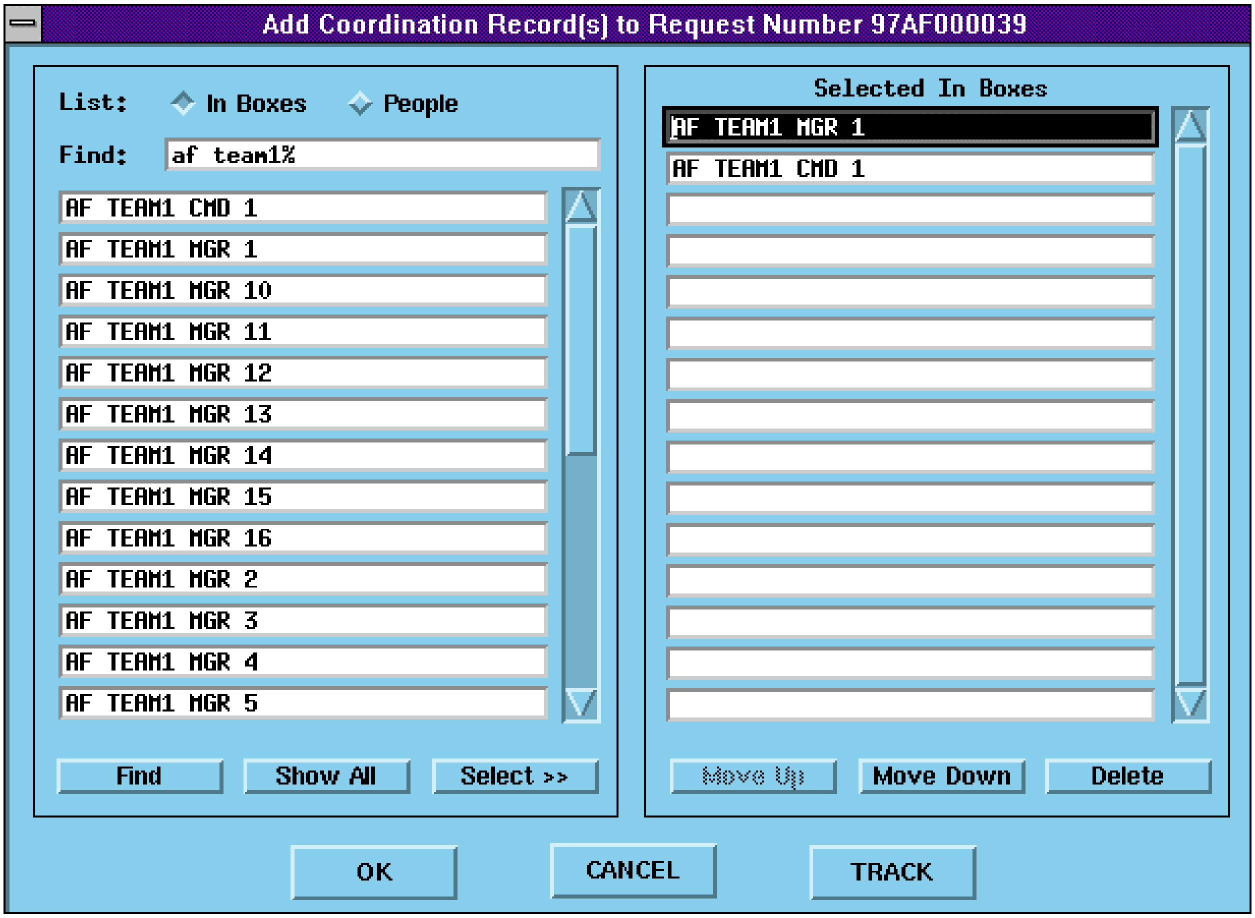

Figure 6-4. Add Record to Routing Sheet Dialog Box

The “Add Coordination Record(s)” box allows users to search for a particular addressee based on the person’s name or the title of their In Box. To locate an individual user by name, click the “People” check box. After the list of names appear, use either the scroll bars at the right and bottom or the “Find” feature to locate an individual addressee. Highlight the line showing the addressee’s name and click “Select”. That addressee is then added to the list on the “Coordination” screen. Repeat this process until all the names are added to the route slip. Click the “OK” button to coordinate the action.

Using the “Find” Feature. To use the “Find” feature, move the screen pointer to the “Find” block located at the top of the dialog box. The cursor should be placed to the left side of the percentage (**%**) symbol, then type part or all of the person’s name (if the “People” block was checked) into the block. The application then narrows the list of selections with each keystroke. To execute the “Find” option, press the **[Enter]** key or click the “Find” command button. When the desired name is located, click the selection and then the “OK” command button within the dialog box. The application then copies the selection to the route slip. To return to the full list of In Boxes or People, click the “SHOW ALL” Button before clicking “OK”.

After the In Box or person's record is located, click the "Select" button to add it to the coordination sheet.

Insert/Move a record. Click on "Selected In Boxes" window, highlight the record, use the "Move Up/Move Down" button to reorder the coordination sheet.

Delete a record. Use the delete key to remove a highlighted record.

Caution: The initiator of a route slip has the capability to establish the full routing (i.e., to the requester, authorizer, resource manager, personnelist, etc.) for an individual action. When the action is routed to another In Box, the user may delete any of the future addressees from the coordination sheet. However, if the initiator creates a Default Coordination Sheet, only that user may delete an addressee from the route slip. If addressee wishes to be deleted from the default route slip, they must determine who placed them on the route slip and then coordinate the action back to that person.

Deleting an Addressee Record

The "DELETE" feature allows users to delete an addressee's record from the route slip. Records may be deleted only if the action has not been coordinated to another In Box. Also, ***only*** the user who added the addressee to the route slip may delete that addressee. To delete an addressee, highlight the record and click the "DELETE" command button.

Adding Notes

To add a note to a route slip, click the "NOTE" command button at the bottom right hand corner of the "Coordination" screen. Figure 6-5 shows a "Note" screen.

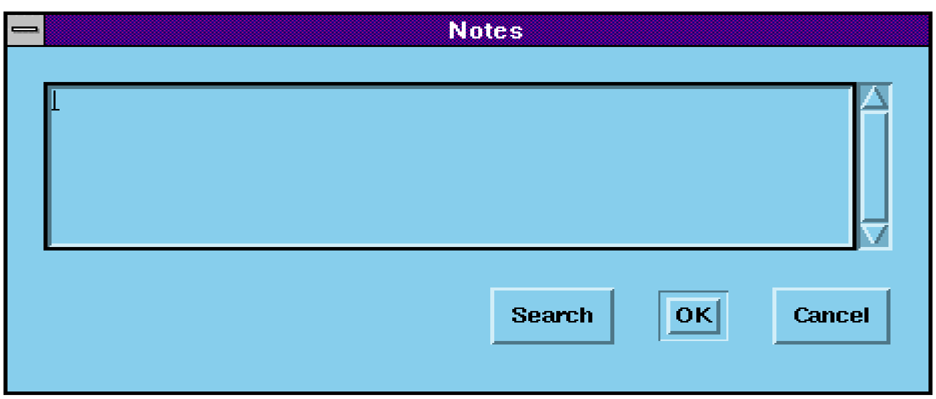

Figure 6-5. Note Screen

Users can add a note by placing the screen pointer in the text window. Since the text window contains a basic text editor, simply type any note or comment regarding the action. Users can search for a specific note by either placing the screen pointer on the scroll bar and clicking the down arrow until the desired note is in view, or clicking the "SEARCH" button. A pop-up window then appears that allows users to search for a word or phrase.

Setting a Default Coordination Sheet

The "Coordination" option allows an individual user to create a Default Coordination Sheet. Once created by the user, the Default Route Slip is not linked with an individual Personnel Action Request and can be used to coordinate single or multiple actions. To create a default route slip, select "COORDINATE" from the In Box Screen. The application will then display the "Coordination Options" dialog box (Figure 6-2). Click the "Set Coordination Defaults" Button. The application will then display the "Default Coordination" Screen (Figure 6-6).

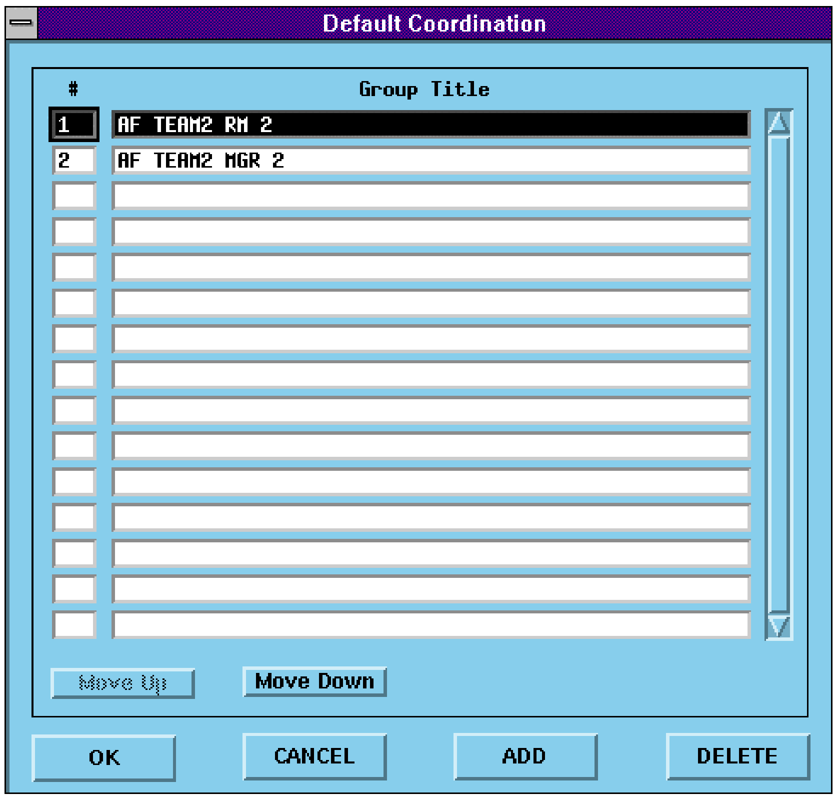

Figure 6-6. Default Coordination Screen

- **OK.** This option allows users to save the list of names on the default route slip.
- **CANCEL.** This feature allows users to return to their In Box. The action remains in the user's In Box until the steps necessary to coordinate it to another user are completed**.**
- **ADD.** This feature allows users to add one or more addressees to the default route slip. The user may also insert a new addressee on the route slip (see the "Adding an Addressee to the Route Slip" section in this chapter).
- **DELETE.** This feature allows users to delete an addressee record from the route slip. (For more information on this feature, see the "Deleting an Addressee Record" section in this chapter.)

Coordinating Multiple Actions

To access the "Coordination" option, click the "COORDINATE" command button found at the bottom of the In Box (see Figure 6-1). The application will display the Coordination Options Dialog Box (figure 6-2).

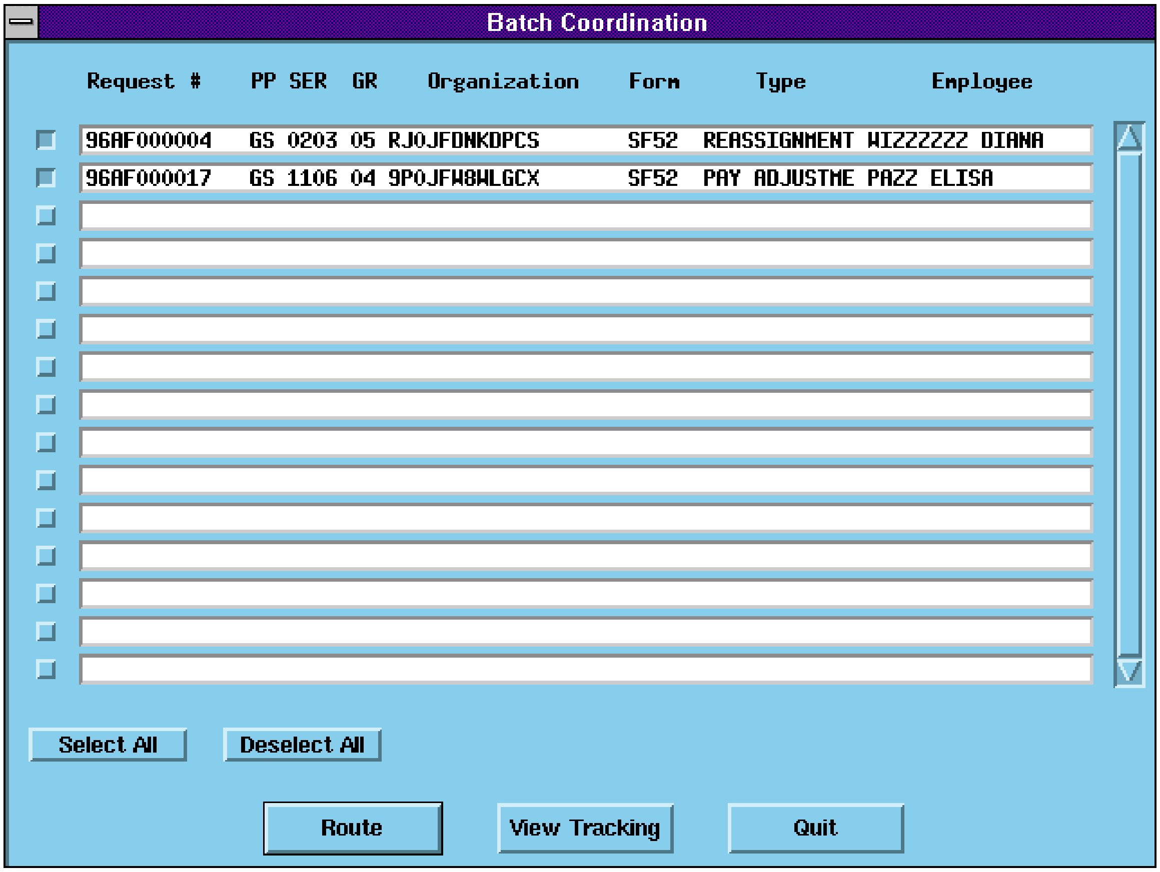

Figure 6-7. Batch Coordination Screen

The Batch Coordination Screen, contains actions that the user created, as well as actions that were sent to the user for coordination and processing. The personnel actions are shown on the screen in ascending order by Request Number. The Batch Coordination screen contains five buttons at the bottom of the screen, "Select All", "Deselect All", "Route", "View Tracking" or "Quit".

View Tracking. By selecting this option, the application will display the Coordination Tracking screen shown in Figure 6-6. The Coordination Tracking screen provides supervisors, managers, and personnelists with information on the current status of the request. Since that information is "*read only*", users may not modify the action or the routing slip. When a Personnel Action Request is coordinated to another user, the Action Tracker is automatically updated. The Action Tracker allows users to view the current route slip for a selected action. Users are encouraged to use this option before selecting the "Route" button.

Selecting Personnel Action Requests. Users can select or deselect one or more personnel actions by clicking the button to the left of the action. To locate a request, use the **[Up/ Down Arrow]** keys or the mouse to move through the list. If there are several pages of requests in the Batch Coordination screen, use the scroll bar or the **[Page Down]** key. Users can also select all of the Personnel Action Requests by clicking the "Select All" Button. To unmark all actions previously selected for coordination, the user must select the "Deselect All" button.

To coordinate multiple records, click the "Route" button, the application will display the Batch Coordination - Routing Options dialog box.

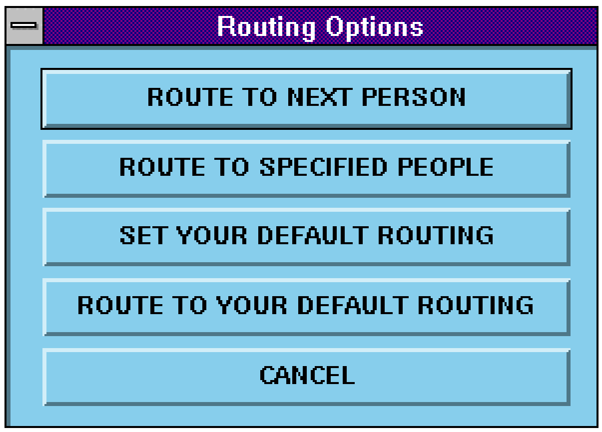

Figure 6-8. Batch Coordination - Routing Options Dialog Box

The Batch Coordination - Routing Options Dialog Box (Figure 6-8) contains five options, "Route to Next Person", "Route to Specified People", "Set your Default Routing", Route To Your Default Routing", and "Cancel".

Route to Next Person. Click the "Route to Next Person" to send the Personnel Action Request(s) to the next addressee on the Coordination Sheet. If no Coordination Sheet exists, the application will then display a message that informs the user that a Route Slip has not been created for that Personnel Action Request (Figure 6-9). The message also tells the user to select "Route to specified people" option.

Figure 6-9. Oracle Forms Message Box

Route to a Specified Person. Click the “Route to a Specified Person” option, and the application will display the “Add coordination Requests” screen (Figure 6-4). Click “OK” to automatically route the selected personnel action request(s) to the next addressee on the route sheet.

Set Your Default Routing. This option allows users to establish a default routing slip.

Route to your Default Route Slip. This option allows users to coordinate the actions selected to the first addressee on the Default Route Slip.

Tracking Function

The Action Tracker provides supervisors, managers, and personnelists with information on the current status of the request. When a Personnel Action Request is coordinated to another user, the Action Tracker is automatically updated. The Action Tracker allows users to display coordination information and notes for a selected action. Since that information is “*read only*”, users may not modify the action or the routing slip.

Coordination Tracking Screen

Information about actions may be obtained by clicking the “TRACK” command button in the In Box (see Chapter Four). After clicking the “TRACK” button, the application will display “Coordination Tracking” screen shown in Figure 6-10.

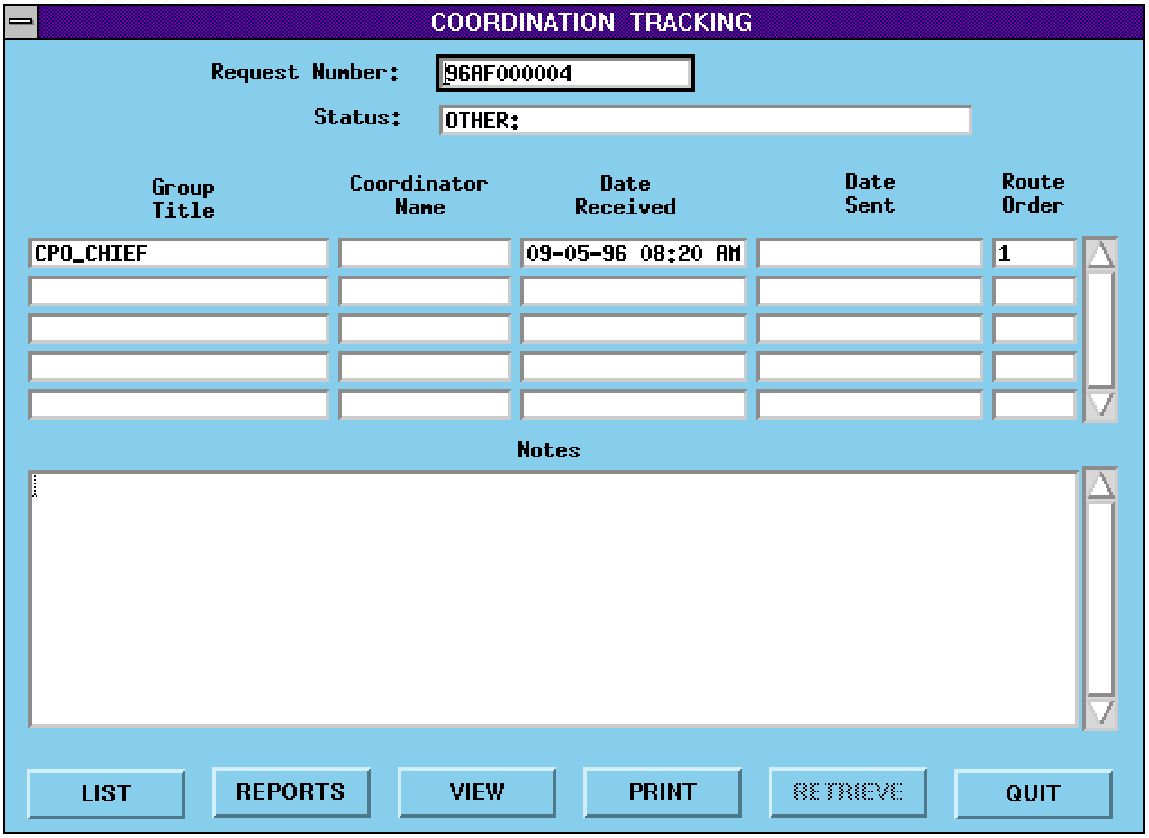

Figure 6-10. Coordination Tracking Screen

The "Coordination Tracking" screen provides information on the location of a particular action, including Group Title, Coordination Name, Date Received and Date Sent to another user or group, and Route Order. The screen also contains two scroll bars and six command buttons. As noted previously in this chapter, the Action Tracker automatically updates the information as the action moves from one user to another. Users must select a Request Number from the "LIST" option to activate the Action Tracker.

Options. The "Coordination Tracking" screen contains six command buttons.

- **LIST.** This button allows users to access a dialog box containing a **<list>** of values for a selected block.

- **REPORT.** This button allows users to print or view statistical reports for different requests or groups. (For more Information, see Chapter Seven, "Reports**."**)

- **VIEW.** This button allows users to view the personnel action request that is currently being tracked. As noted earlier, users are not permitted to make any modifications to the form while viewing in the tracking mode.

- **PRINT.** This button allows users to print a Personnel Action Request.

- **RETRIEVE.** This button allows personnelists to reactivate a closed Personnel Action Request. **This option is available for personnelists only.**

- **QUIT.** This button returns the application to the previous screen.

Tracking an Individual action

Users may review tracking information on an active Personnel Action Request by inserting a Request Number into the designated block on the "Coordination Tracking" screen.

Selection List for the Request Number

Users may select a personnel action request by moving the cursor to the "Request Number" block on the "Coordination Tracking" screen and then click the "LIST" command button to access the "List Options" dialog box (Figure 6-11). The application also permits users to type a Request Number into the "Request Number" block.

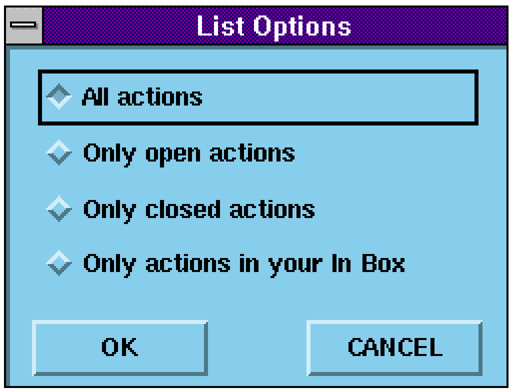

Figure 6-11. List Options Dialog Box

The List Options Dialog Box allows user to narrow the search for a particular Personnel Action Request.

- **All actions.** This option allows users to search for any actions that the user created, as well as actions that were sent to the user for coordination or processing.

- **Only open actions.** This option allows users to narrow their search to active actions, i.e., those action not closed by the civilian personnel office.

- **Only closed actions.** This option allows users to narrow their search to closed actions, i.e., those actions closed by the civilian personnel office.

- **Only actions in your In Box.** This option allows users to narrow their search to only those actions currently found in their In Box.

For illustration purposes, the user will select "Only open actions", by clicking the check box located to the left of the option. The application will then display the "Select a Request Number" Screen (Figure 6-12).

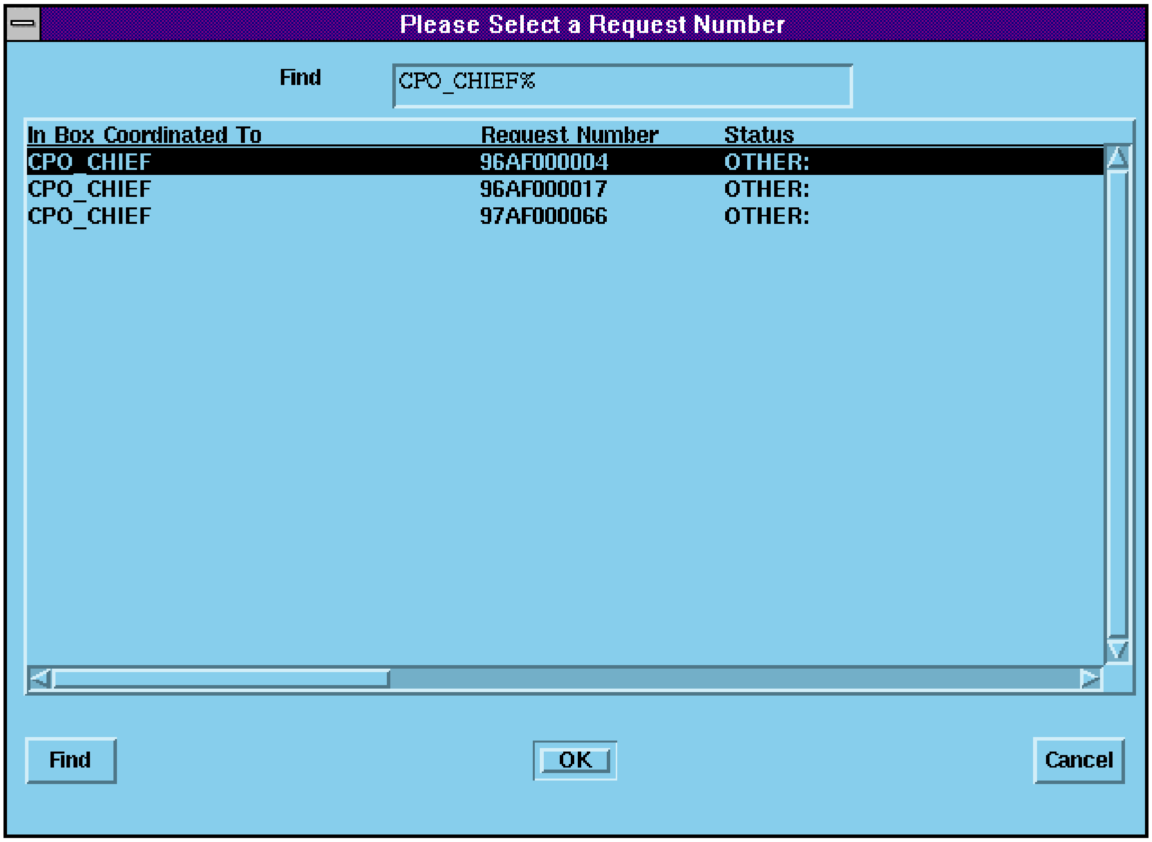

Figure 6-12. Selection List For Request Number Screen

Users then receive a list of actions (sorted numerically by Request Number) that have passed through their In Box, but are still outstanding. To select an action by Request Number, use either the scroll bars at the right and bottom of the dialog box or the "Find" feature to identify the desired Request Number.

Using the "Find" Feature. To use the "Find" feature, move the screen pointer to the "Find" block located at the top of the dialog box. The cursor should be placed to the left side of the percentage (**%**) symbol. Then type part or all of the group title. To execute the "Find" option, press the **[Enter]** key or click the "Find" command button.

When the desired Request Number has been located, highlight the action and click the "OK" command button within the dialog box. The application then inserts the Request Number into the first block on the "Coordination Tracking" screen, as shown previously in Figure 6-6. Users must select each action individually. For each action, the application displays information concerning the coordination of the action, including the name of all users who have reviewed or acted on the Personnel Action Request; when they received and forwarded the action; the current location of the action; the action's status; and what notes, if any, were added for the record.

Updating the Status

PERSACTION does not automatically update the Status of an action. Therefore, users must change the Status **before** they coordinate the action to another user. For example, after managers create and approve a personnel action request for a "FILL/RECRUIT" action, they should access Action Tracker, which changes the "Status" block to read, "Action Completed."

To update the "Status," click the "TRACK" command button located in the In Box. The application then displays the "Coordination Tracking" screen (as shown previously in Figure 6-10).

As discussed above, users may select a Personnel Action Request by clicking the "Request Number" block and using the "LIST" option to select a particular action. The application then inserts the Request Number into the appropriate block on the "Coordination Tracking" screen. For each action, the application displays information concerning the coordination of the action, including its current status.

To update the "Status" of an action, click the "Status" block located underneath the "Request Number" block and the "LIST" command button at the bottom of the screen. The application then displays the "Select Status" dialog box (Figure 6-13).

The "Select Status" dialog box contains a list of processes (in process order); two scroll bars; and "OK" and "CANCEL" command buttons.

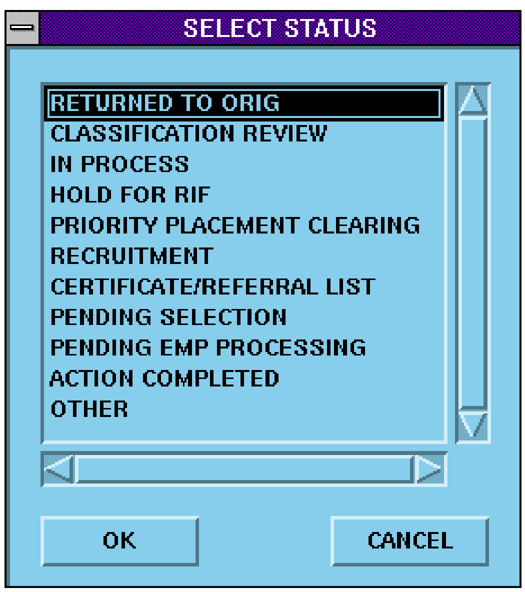

Figure 6-13. Selection List For Status

Viewing a Personnel Action Request

Click the "VIEW" command button in the "Coordination Tracking" screen to display Page One of the Personnel Action Request shown in Figure 6-14.

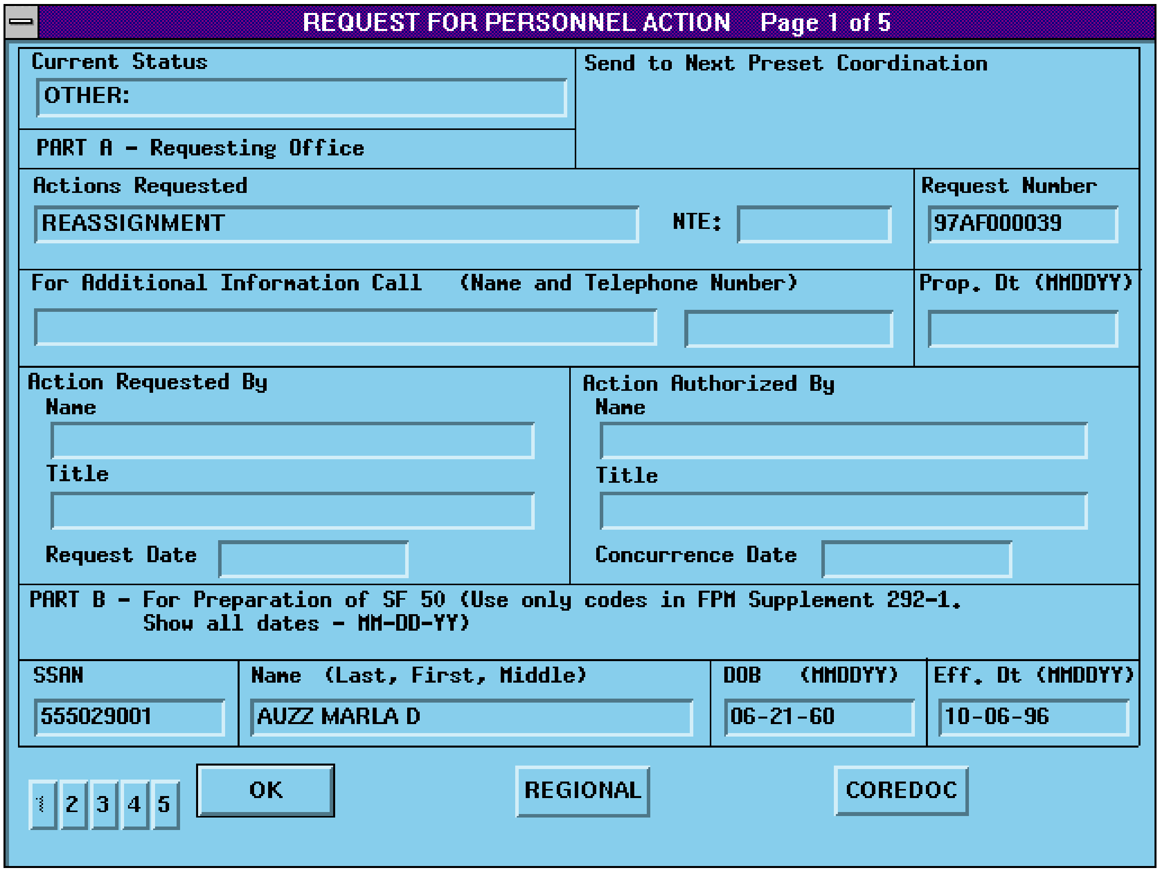

Figure 6-14. Viewing a Personnel Action Request

The information is "*read only*", users may not modify the information on the Personnel Action Request. Users may view another page by clicking the desired page number button on the lower left-hand corner of the Personnel Action Request page. The screen also contains the "REGIONAL" and "COREDOC" command button.

Regional Application Displays Screen

Click the "VIEW" command button in the "Coordination Tracking" screen to display Page One of the Personnel Action Request shown in Figure 6-14. By clicking the "REGIONAL" command button, the application displays the Region Application Displays Screen containing several *"view only"* screens. Since most Personnel Action Request data, such as time-in-grade dates, are included in the Employee Data screens, these should be helpful in processing personnel actions.

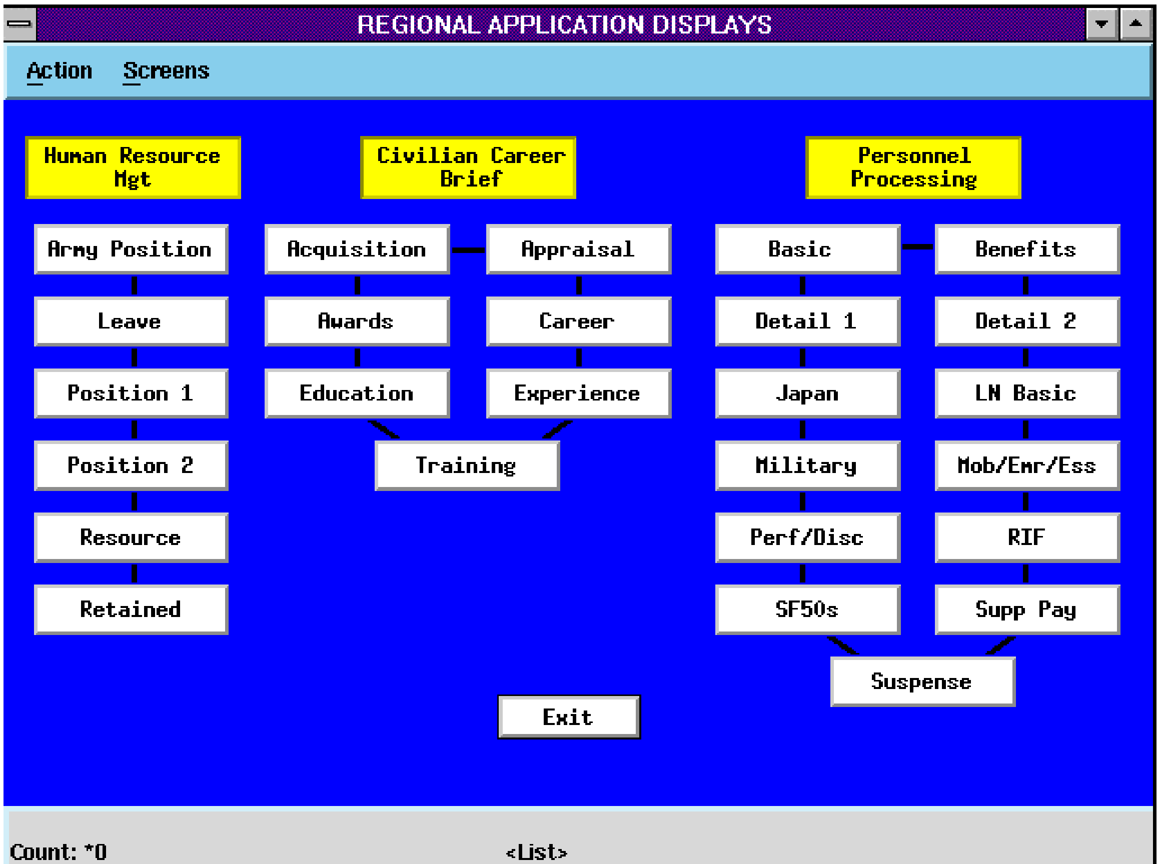

Figure 6-15. Regional Application Displays Screen

Clicking the "Exit" button return the application to the previous screen.

Viewing an attached Core Document.

Click the “VIEW” command button in the “Coordination Tracking” screen to create the screen shown in Figure 6-10. The “COREDOC” command button only appears when there is a core document attached to the selected personnel action request. The “view” feature allows users to view and print a core document.

Click the “COREDOC” button to reveal the Core Document Edit Menu. Select the “View” option located in the Menu Bar. A pop message telling users how to print the document to the printer will appear as shown in Figure 6-16.

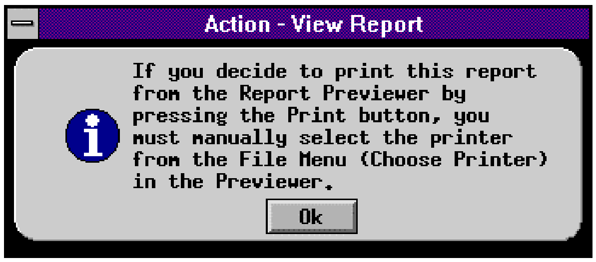

Figure 6-16. Action - View Report Box

Click the “OK” button and the application will display the “Previewer” screen containing the core document.

A “Previewer” screen allows users to view an entire core document or report before they print it. Users can view the whole page at a time or see elements of the report. If the user decides their ready to print after checking the pages, choose the “Print” button to open the “Print” dialog box. For illustration purposes, Figure 6-17 displays the “Previewer” screen for the secretarial position.

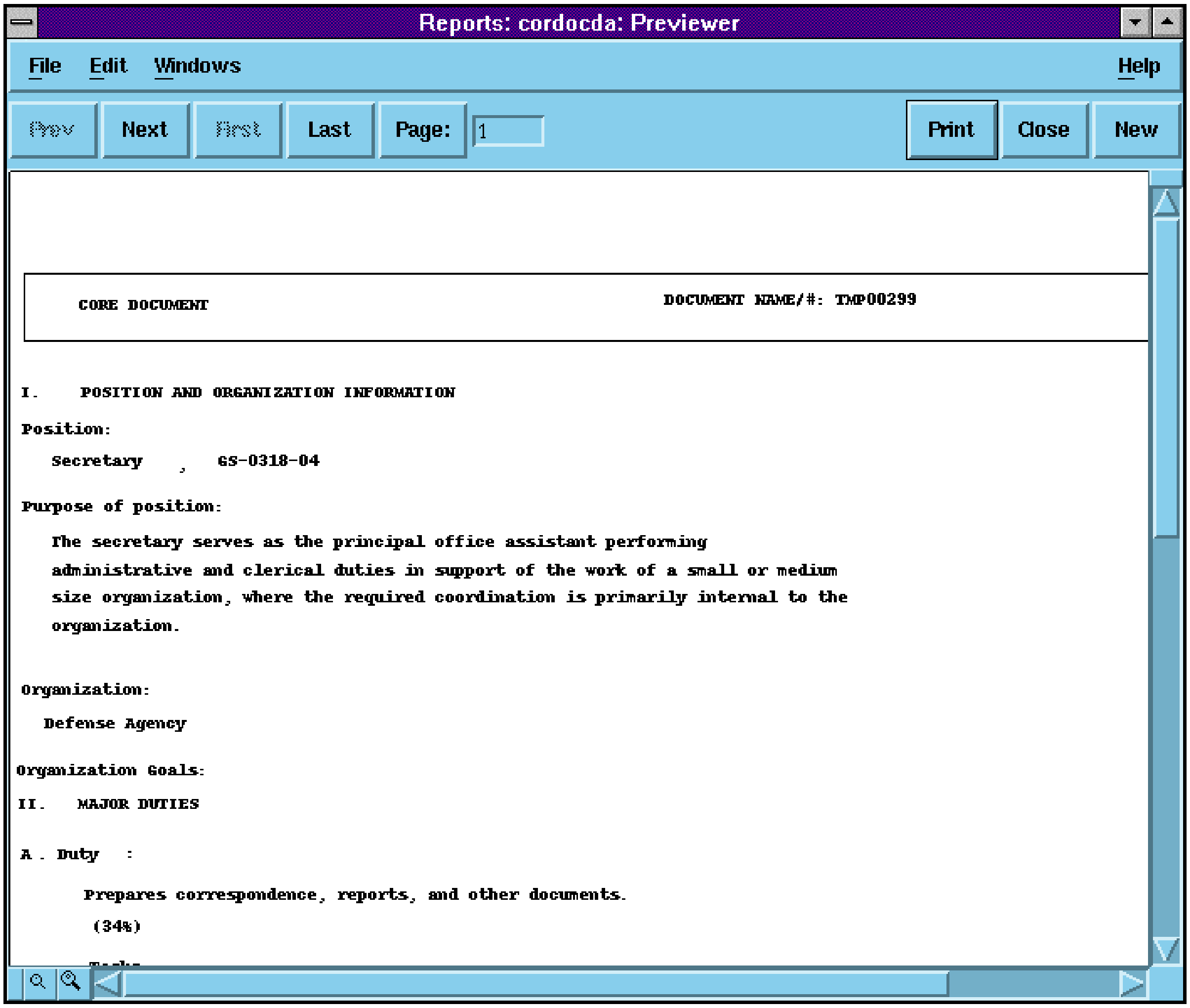

Figure 6-17. Previewing a Core Document

In addition to the standard window elements, the Previewing screen contains zoom buttons, two scroll bars, page finder, menu bar, and seven command buttons. The command buttons are "PREV," "NEXT," "FIRST," "LAST," "PRINT," "CLOSE," and "NEW".

The menu bar contains four options -- "FILE," "EDIT," "Windows," and "Help". The "Help" menu provides assistance in using the command buttons, scroll bar, and keys to navigate through the Previewing screen.

The scroll bars can be used to view the first page of the form. The "zoom" feature can also be used to view the first page of the form; it is located to the left of the bottom scroll bar. The "zoom in" feature looks like a magnifying glass and enables users to magnify a block for easy viewing.

To view the second page of the form, either click “NEXT” or “LAST,” or use the “page finder.” The “page finder” is initiated by typing in the number of the desired page in the “page finder” block.

If the user decides they are ready to print a core document, they must select the “choose printer” option under the “File” menu. After a printer is selected, users may click the “Print” button to open the “Print Job” dialog box (Figure 6-19).

Use one or more of the following options to navigate through the “Previewer” screens:

- **Scroll Bars.** The horizontal scroll bar provides a view of the entire screen from the left to the right margins. To locate the last record on the report, drag the scroll box located between the arrows of the vertical scroll bar.

- **Zoom Feature.** The “zoom out” and “zoom in” options are located next to the horizontal scroll bar at the bottom of the “Previewer” screen. They provide the capability to focus on a specific section of the screen. To use the “zoom in” feature, click and drag the object to any point on the “Previewer” screen. The application then automatically enlarges that part on the report to 100%. Click the “zoom out” object to normalize the screen.

- **Command Buttons.** The “FIRST” and “LAST” options display the first or last page of the report, respectfully. The “NEXT” option moves the screen pointer to the first record on the next screen.

- **Page Finder.** The “Page Finder” option is located next to the “LAST” command button on the top of the “Previewer” screen. By entering a page number, such as “7,” and click the “PAGE” command button, the application quickly moves the screen pointer to the first record on the designated page.

After the printing in completed the software will return users to the Core Document Edit Menu screen.

Printing a Personnel Action Request

The “Print” feature is activated by clicking the “PRINT” command button located at the bottom of the “Coordination Tracking” screen. It is also accessible from the Previewing screen shown in Figure 6-17. The “PRINT” command allows users to view and print a particular action. When that command button is clicked, the following screen appears:

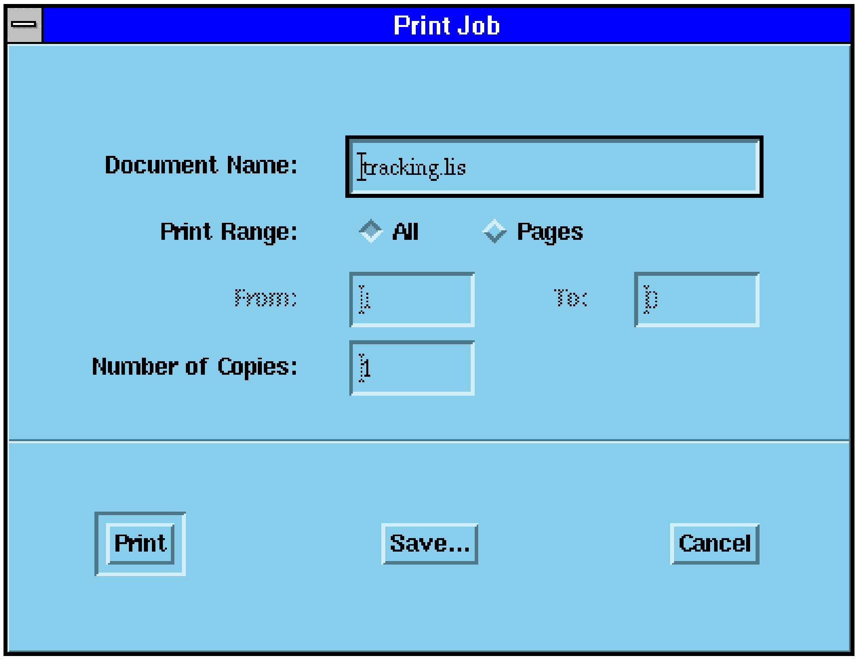

Figure 6-18. Print Job Dialog Box

To print all pages of a report, click the “ALL” button. Click the “PAGES” button to allow users to print selected pages of the report by using the “From” and “To” blocks. The application automatically prints one copy of the selected report. To print multiple copies, enter the desired number in the “Number of Copies” block.

Retrieving a Closed Action

All Personnel Action Requests must be reactivated through the Action Tracker. The “Retrieve” option allows designated personnelists to retrieve an action from the closed file. To retrieve an action, click the “TRACK” command button located either at the bottom of the In Box or on the “Title” screen. The application then displays the “Coordination Tracking” screen. Click the “Request Number” block to display a dialog box listing all the actions that the user created (Figure 6-19).

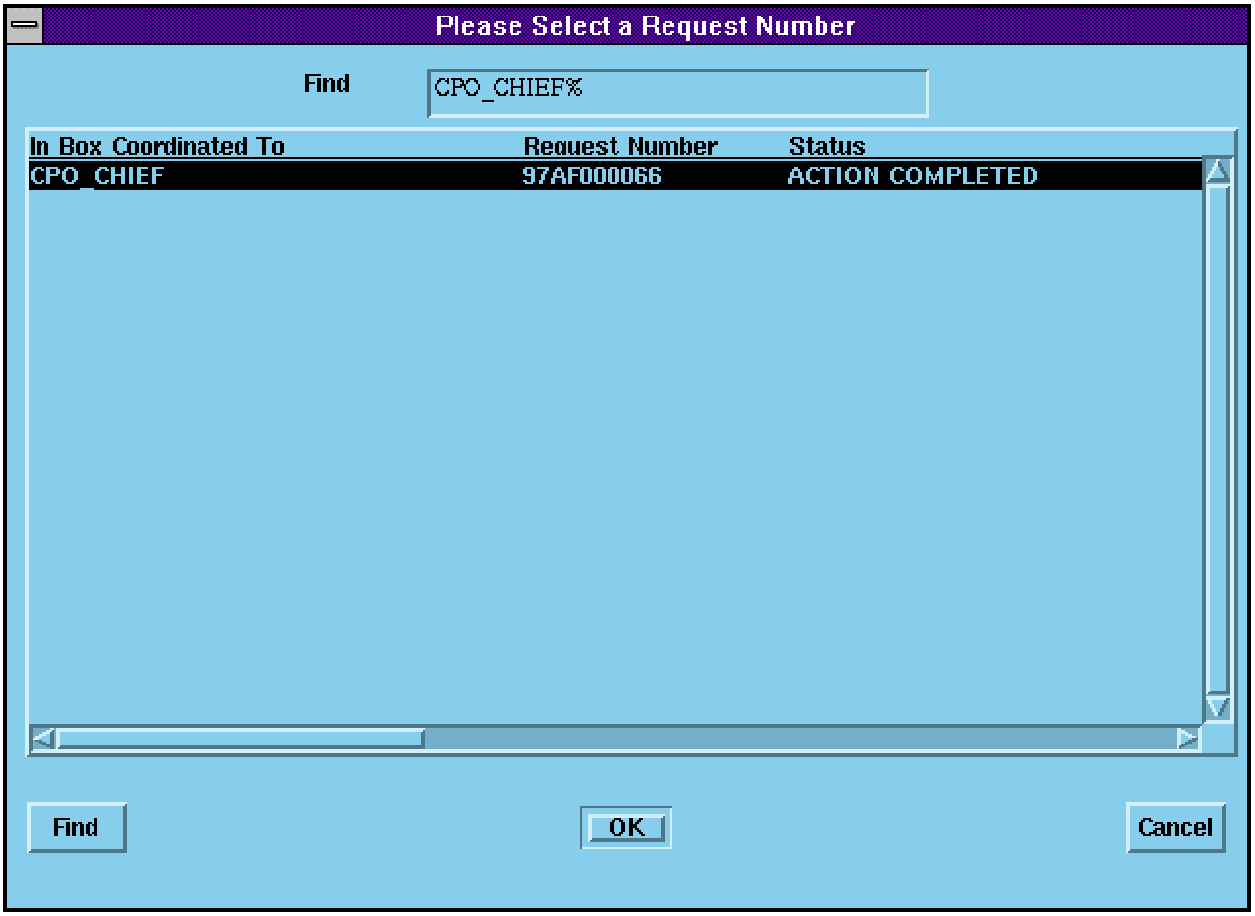

Figure 6-19. Select a Request Number Dialog Box

The list of actions are sorted numerically by “Request Number” within each Group. The dialog box also contains a “Find” feature, two scroll bars, “OK” and “CANCEL” command buttons.

To retrieve a closed action, use either the scroll bars at the right and bottom of the dialog box or the “Find” feature to identify the desired “Request Number.” Then highlight the desired “Request Number” and click “OK”.

The application then inserts the “Request Number” into the appropriate block on the “Coordination Tracking” screen (Figure 6-10). To retrieve the closed action, click the “RETRIEVE” command button located at the bottom of the “Coordination Tracking” screen. The application then displays a message box that states: **“ Request Number (97AF0195) will be retrieved and be placed in the In Box of whomever closed it.”** When this message appears, click the “OK” command button. If a particular Personnel Action Request is selected in error, click the “CLOSE” command button from the In Box to close the action.

CHAPTER SEVEN: REPORTS

This chapter contains step-by-step instructions for generating a report from the PERSACTION system.

Regional Application Display Screens

PERSACTION allows the user to view the Employee and Position Display Screens contained in the Regional Application. Those screens are "view only," so users cannot change any of the information on them. Since most conversion due dates, temporary appointment dates, time-in-grade dates, and other employee data are included on the "Employee Data" screens, the screens can be used to plan and process personnel actions. Furthermore, accessing these screens may preclude the need to pull Official Personnel Folders (OPFs) whenever employee information is needed. When an employee's SSAN is entered onto Page One of the Personnel Action Request, PERSACTION pulls all associated data from DCPDS and enters it on the form. The "REGIONAL" command button is activated when a SSAN is selected for a Personnel Action Request.

Click the "REGIONAL" button to display the Regional Application Displays Menu Screen shown in figure 7-1.

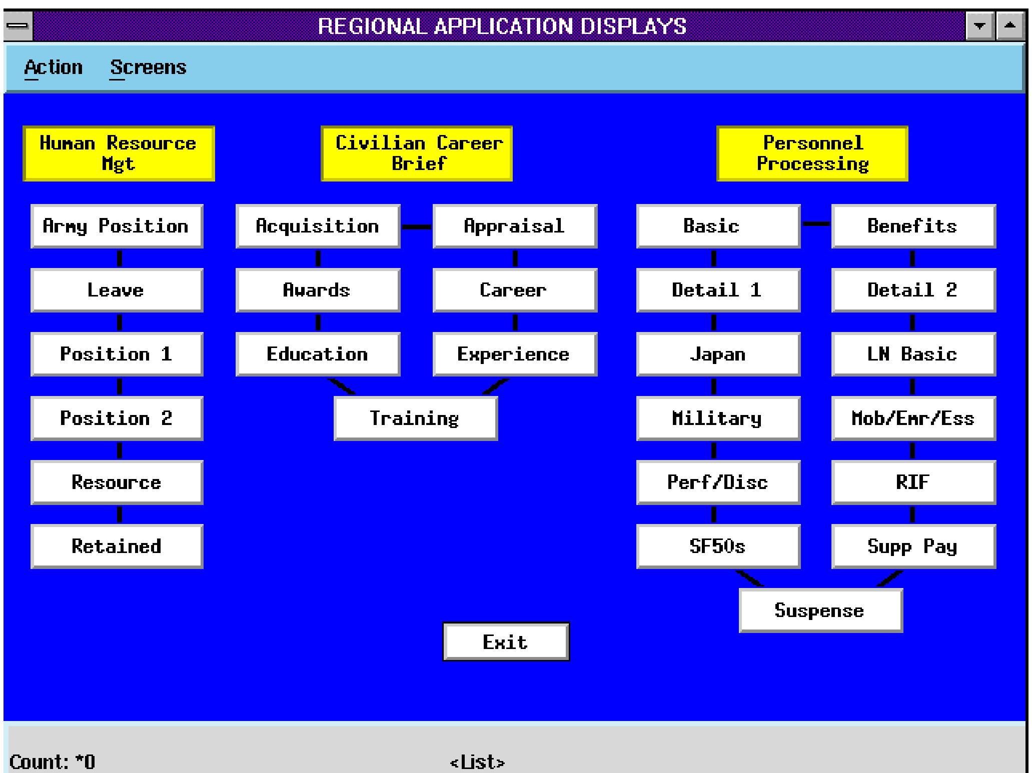

Figure 7-1. Regional Application Displays Menu Screen

The information stored in the Regional Application Displays system has been grouped into three basic categories. They are Human Resources Management, Civilian Career Brief, and Personnel Processing. These three boxes are YELLOW on the actual data screen as it appears on the monitor. Each of the three display areas have data buttons that are available for presentation of information to the personnelists and the manager. Users can access the display screens in several ways:

- Click the WHITE data area associated with the specific data screen, or
- Select the appropriate category or sub-category from the "Screens" option on the menu bar.

Accessing the Regional Application Displays Screens

As mentioned earlier in this chapter, users can view the employee, position, and pay data contained in the Regional Application database by clicking the "Displays" button located on the Regional Application Main Menu Screen. This activates the Regional Application Displays Menu Screen (Figure 7-1). To view the data contained in a specific sub-category of data, users must click the appropriate WHITE box. For example, click the "Leave" button located under the Human Resources Management Screen and the application will display a blank Leave Data Screen. Figure 7-2 displays a completed query of an employee's leave status.

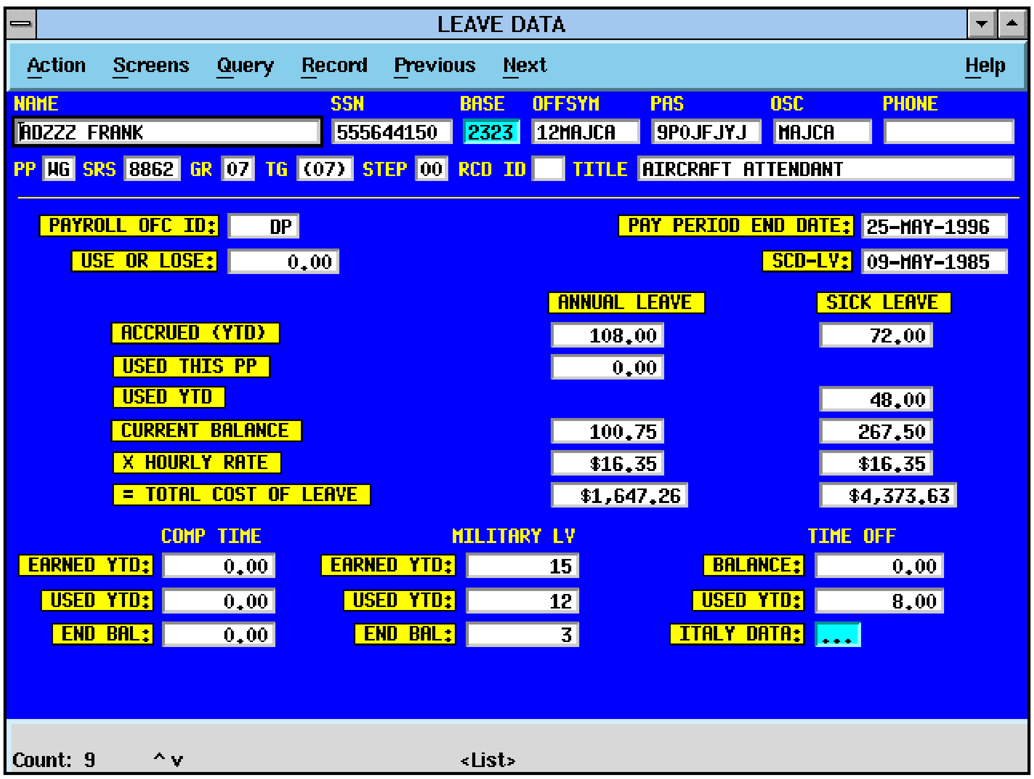

Figure 7-2. Leave Data Screen (Regional Application) With A Query Completed

Users can execute a query of a specific employee by inserting the employee's name or SSN in the proper data fields on the blank Leave Data Screen. Inserting both data fields will ensure access to the proper employee's record as employees may have the same last and first names, but not the same SSN. After entering the information, click **Execute Query** on the **Menu Bar** to execute the query. This will populate the blank fields. To clear the data fields, click **Query** and then **Enter Query** that will clear the data fields for a new Query. To exit, click **Action**, then **Exit**.

Accessing the SF-50 History File

Additionally, the Regional Application contains an SF-50 Processing Module. The SF-50 print files from DCPDS will be captured daily for inclusion into the Regional Application with the capability of viewing, printing, and authenticating the electronic SF-50s. Once the electronic SF-50s are authenticated, they will be stored in the SF-50 History File in the Regional Application. User should refer to the Regional Application User Guide before accessing the SF-50 files.

One of the features of the Regional Application is the ability to view a specific SF-50 for an employee. By accessing the SF-50s for an employee, managers and personnelists may preclude the need to pull Official Personnel Folders whenever employee information is needed.

Users can also view SF-50s for an individual employee from within the PERSACTION system by accessing the Regional Application System. The "SF-50 History" screen is accessed by clicking the "REGIONAL" command button. The "REGIONAL" command button is activated when a SSAN is entered on a Personnel Action Request **and** there are SF-50s in the Regional Application for that employee.

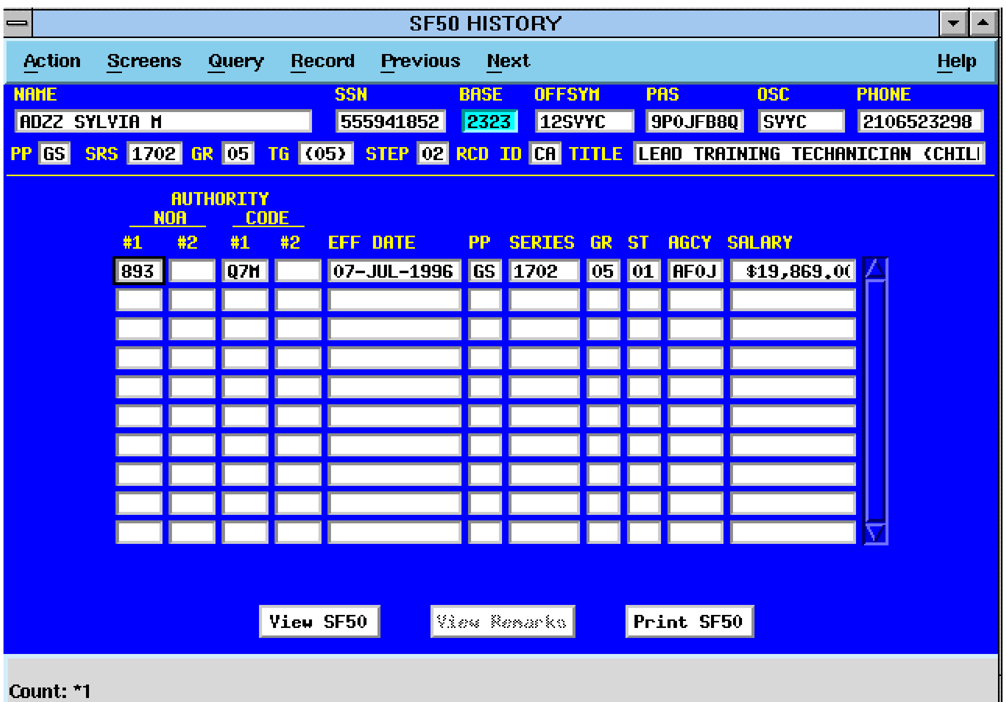

Figure 7-3. SF-50 History Screen

The application will display the Regional Application Display Menu Screen (Figure 7-1). Click the "SF-50" button under the "Personnel Processing" Category. The application will then display a blank SF-50 History Screen. Figure 7-3 contains information on an employee after an employee record has been queried. The NOA codes will contain information on the selected employee if any NOAs have been taken.

Users can exit the "SF-50 History" screen by selecting "Action" from the Menu Bar and then clicking the "Exit" option.

The "SF-50 History" screen contains a header, a list box, and two command buttons. The header contains current information on an employee, including his/her Name, Social Security Number (SSN), Duty Station (Base), Office Symbol (OFFSYM), Pass Code (PAS), Telephone Number (phone), Pay Plan (PP), Series, (SRS), Grade (GR), Step, Target Grade (TG), and Position Title. The "View SF50" and "Print SF50" command buttons are activated once an individual SF-50 record is highlighted.

Viewing an Individual SF-50 File

To view an individual SF-50 file, highlight the desired SF-50 file by using the mouse or the **[Down Arrow]** key. Users should notice that the "View SF50" command button is now activated. Once the "View SF50" option is selected, the application will display the "Print Previewer" screen shown in Figure 7-4.

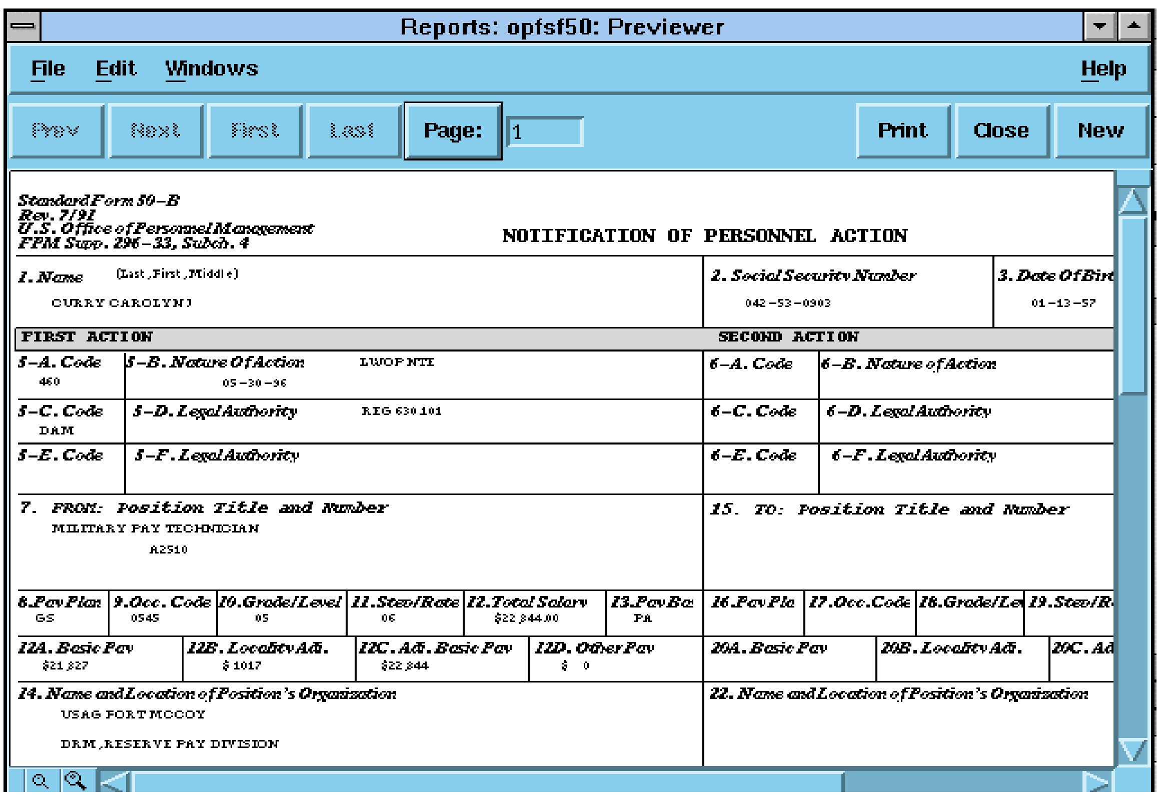

Figure 7-4 Print Preview Screen

The "Print Previewer" screen contains a menu bar, seven command buttons, a page finder, two scroll bars, and a zoom feature. To view the entire SF-50 record, use the horizontal and vertical scroll bars.

Users may focus on a specific section of the screen by using the zoom feature. The zoom objects are located next to the horizontal scroll bar at the bottom of the "Print Previewer" screen. To use the zoom feature, click and drag object to any point on the screen. The application will automatically enlarge that part of the screen to 100%. Click the "zoom out" object to normalize the screen. Click "CLOSE" (Figure 7-4) to return to the "SF-50 History" screen (Figure 7-3).

Tracking Reports

"Tracking Reports" can be accessed either from the "Coordination Tracking" screen (Figure 6-12) or from the In Box. Click the "REPORTS" command button. Two "Tracking Reports" are currently available, including the Personnel Action Request Tracking Report (also referred to as "Action Request Tracking") and the In Box/Locator Status reports.

Each report contains a header and footer. The report header includes the Name of the Report, Number of Personnel Action Requests, Number of Actions, and Date and Time the report was created. The report footer contains the elements selected on the report parameter screen. The In Box Status and the Locator (Outstanding Action) Reports are printed in "landscape" orientation.

PERSACTION make use of the user's organization code when selecting records from the database. Users may obtain data based on the Personnel Action Requests that have either passed through their In Box or a subordinate's In Box. To selected a report, highlight the desired report and then click the "OK" command button.

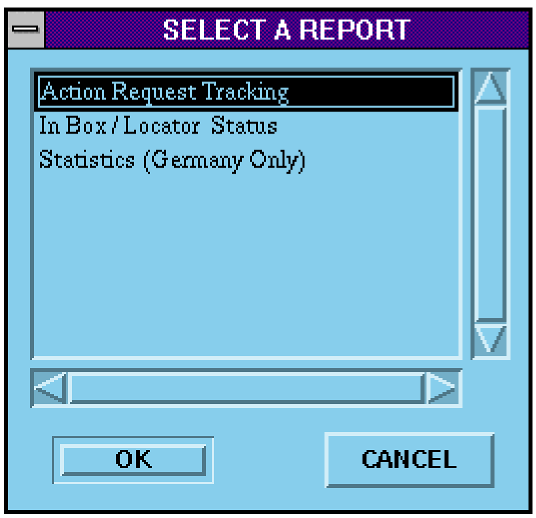

Figure 7-5. Select A Report Dialog Box

Click "CANCEL" to cancel selections.

Personnel Action Request Tracking Report

The "Action Request Tracking Report" provides information similar to that available for individual actions on the "Coordination Tracking" screen, except it does not display any notes associated with a Personnel Action Request. This report provides a quick reference for users on the movement and location of all Personnel Action Requests in their organizations.

For each action, this report shows the Request Number, Pay Plan, Series, Grade, Status Type, Position Title, Days in Process, and route slip. For each addressee on the route slip, the application displays the Group Name, User Identification, and Date Received and/or Forwarded to another In Box, and the Days in Process.

When this report is selected, users are provided a screen for entering their report parameters. If no parameters are entered for the Starting and Ending Dates, Request Number, and Status, then users will receive a report containing all actions that have passed through their In Box.

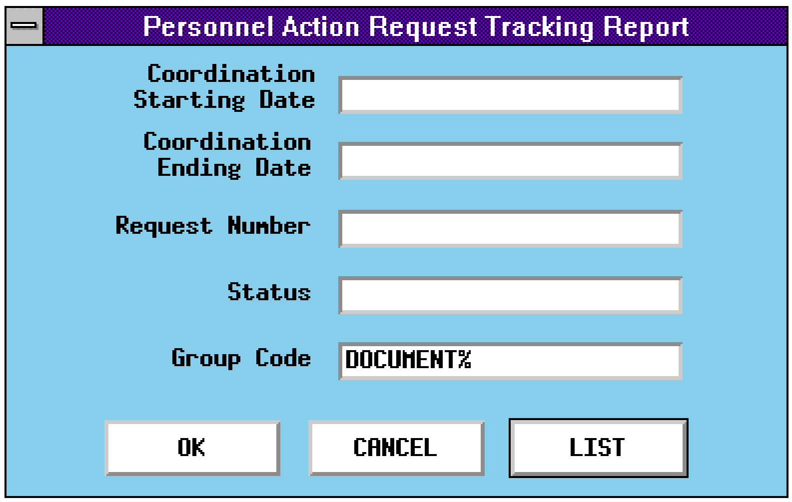

Figure 7-6. Personnel Action Request Tracking Report Parameter Screen

Users ***must*** enter a “Request Number” or a “Group Code” into the parameter’s screen, otherwise the application cannot generate a report. Users may further limit the report by entering the Starting and Ending Dates, Request number, or Status in the appropriate blocks. To cancel a report, click the “CANCEL” command button.

The parameter blocks on the “Action Tracking Report” screen are described below.

- **Coordination Starting and Ending Dates.** These blocks may be left blank. Enter the month, day, and year into this block using any format, such as 07/01/95. When the **[Enter]** key is pressed, the application inserts dashes into the date. If users enter a date into the “Coordination Ending Date” block, the date must be equal to or greater than that in the “Coordination Starting Date” block.

- **Request Number.** Users may type a specific “Request Number” or click the “LIST” command button to obtain a list of “Request Numbers” in ascending order within each organization (group code) on the screen. To make a selection, click a “Request Number” or use the **[Arrow]** keys to highlight a selection and then click “OK."

- **Status.** Users may leave this block blank. Click the "LIST" command button to create an alphabetical listing of status types for an action. To select a process, use the **[Arrow]** keys or the **[Scroll Bar]** to highlight the record, then click "OK."
- **Group Code.** The Group Code identifies all actions initiated by or acted upon any member of the user's group or a subordinate group. Group Codes are established based on an organization's hierarchical structure. The Integrated FPI Suite Program Coordinator establishes an Organization Code for every employee who uses the application. Those codes determine the employee and/or position records that can be accessed for processing personnel actions. If the Group or Subordinate Group code is unknown, click "LIST" after clicking in the "Group Code" block. By selecting the "LIST" feature, the application displays a list containing the name and organizational component of those in the User's Group.

Customizing the Personnel Action Request Tracking Report

As mentioned previously, users may limit the number of Personnel Action Requests that will appear on their report. We recommend that users should enter information in the status or request number blocks.

The status and request number blocks contain a search feature. Highlight the block using the mouse or press the [Tab] key. Users will then enter one or two digits followed by the "%" sign and press the [Enter] key. The application will display a List Box. Highlight the correct entry and click the "OK" button to populate the block.

<u>EXAMPLE</u>. At the Army's Southeast region, the first two characters of the request number designate the location where the action was originated. A team leader can generate a report containing the outstanding actions for Fort McPherson by entering "MC%" in the "Request Number" block within the parameter screen. Click the "OK" button. The application will then display the first page of the Personnel Action Request Tracking Report.

PERSACTION In Box/Locator Report

The PERSACTION In Box/Locator Report allows the user to displays a listing of all the Personnel Action Requests by Report Type (Open or Closed) and Report Name (In Box or Locator). The PERSACTION In Box/Locator Status Reports are displayed in landscape orientation, and contain the following elements: Request Number, Action Type, Status, Pay Plan, Series, Grade, Organization Code, Name, Current Group, Days in Personnel Office, Days in Current Group, Effective Date, and Nature of Action.

For illustration purposes, Figure 7-7 shows the parameter screen for the In Box/Locator Status Report.

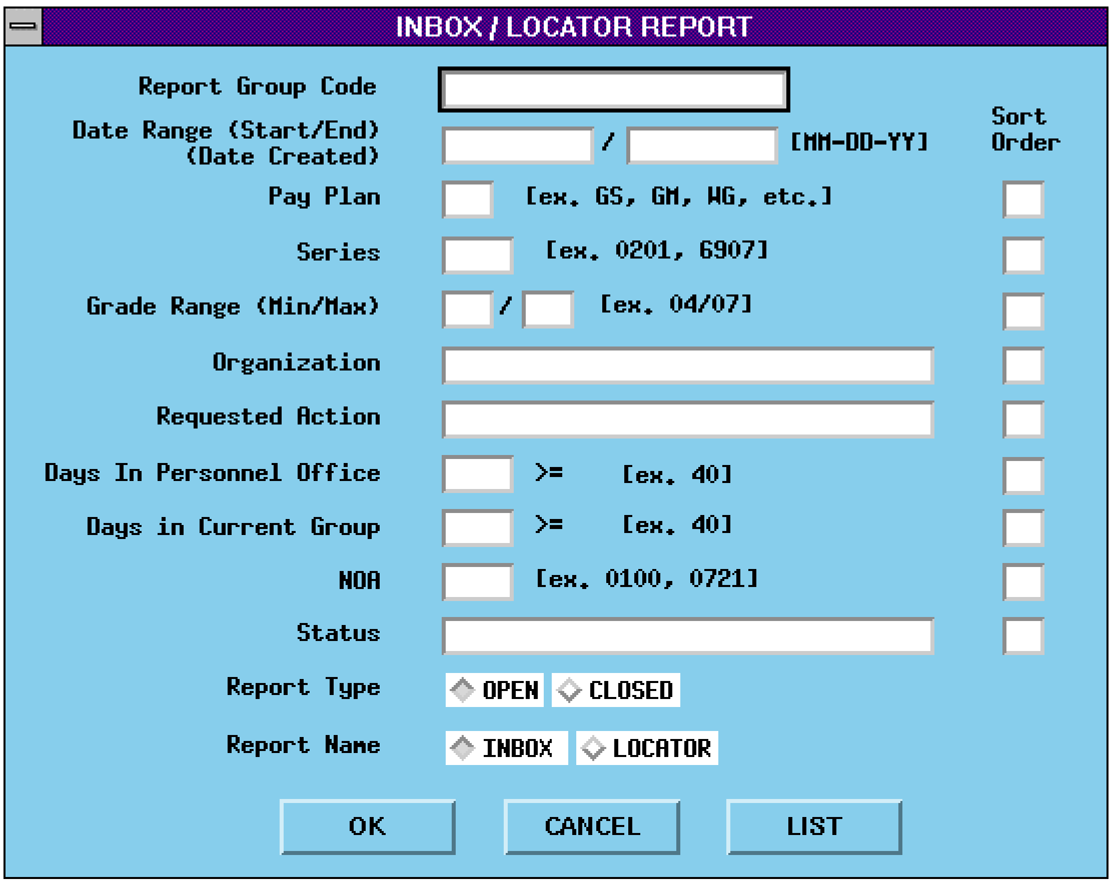

Figure 7-7. PERSACTION In Box/Locator Status Report Screen

Users ***must*** enter a “Report Group Code” into the parameter’s screen to receive the report results on the screen. The application also displays a list of Personnel Action Requests that are currently in or have passed through the user’s In Box. For supervisors and managers, the report provides a list of actions for their entire organization.

Selecting Data Elements

The user may further limit the number of actions for the report by entering a Date Range, Pay Plan, Series, Grade Range, Organization Code, Request Action, Days in Personnel Office, Days in Current Group, Nature of Action, or Status. To cancel a report, click the "CANCEL" command button.

The PERSACTION Group Status Report parameter screens contain the following elements:

- **Report Group Code.** The Group Code identifies actions initiated or acted upon by anyone in the user's group or a subordinate group. The codes are established based on an organization's hierarchical structure. As noted previously, a PERSACTION Organization Code is assigned to every employee who has access to the application. The user's Organization Code determines the employee and/or position records that are accessed for processing personnel actions. If the code is unknown, user may select the "LIST" option after clicking in the "Group Code" block. By selecting the "LIST" feature, the application displays a list of all components in the user's organization.
- **Date Range (Start/End).** The Date Range blocks may be left blank. Users can enter the data range using dashes or slashes, i.e., 07-01-95. When a date is entered in the "Coordination Ending Date" block, it must be equal to or greater than the date in the "Coordination Starting Date" block.
- **Pay Plan.** The Play Plan block may be left blank. Users may enter a Pay Plan, i.e., "GS" for General Schedule.
- **Series.** The Series block may be left blank. Users can enter a four digit occupational code, such as "0334" for Computer Specialist.
- **Grade Range (Min/Max).** Users may enter a two digit numeric code in one or both of these blocks.
- **Organization**. Users may enter an Organizational Code in this block. However, the recommended method for locating a record is to use the "LIST" feature.
- **Request Number.** Users may type a specific request number or click the "LIST" command button to obtain a list of "Request Numbers" in ascending order on the screen. To select a Request Number, click a particular number or use the **[Arrow]** keys to highlight the record, then click the "OK" command button.
- **Days in Personnel Office.** This block may be used to enter the numbers of days actions are in the Civilian Personnel Office. If the user enters a value of "2", the application provides a list of actions that were in the personnel office for longer than two days.
- **Days in Current Group.** This block may be used to enter the number of days the action was with the "Current Group." The application provides a list of action that were in the group more than the specified number of days.
- **NOA.** This block enables users to limit the report to a specified nature of action (NOA), such as "0702" for promotion. Users may leave this block blank. Users may enter a specific NOA or click the "LIST" button to obtain a list of NOAs processed within a group code.

- **Status.** Users may leave this block blank. Click the "LIST" command button to create an alphabetical listing of status types for a particular action. To select a process type, click a status or use the **[Arrow]** keys to highlight the record, then click "OK".
- **Report Type**. This block enables users to select the type of personnel action requests that will appear on the report. Click the "CLOSED" button to select a listing of inactive actions. Click the "OPEN" button to select a listing of outstanding actions. **Personnel Action Requests closed by the Civilian Personnel Office will not be displayed on a report when selecting "open" as the report type.**
- **Report Name.** This block enables user to select the location of the actions (open, closed, or all) that will appear on the report. Click the "In Box" button to display all the actions currently within the In Box. Click the "Locator" button to display all the actions originated for an organization (Group) Code.

Selecting How a Report is Sorted

The PERSACTION In Box/Locator Reports contain nine sort parameters. Users may determine the sort of an In Box Status Report by entering a number, from one to four, in the box that corresponds to each parameter. The sort parameters are Pay Plan, Series, Grade Range, Organization Code, Request Number, Days in the Personnel Office, Days in Current Group, Nature of Action Code, and Status.

Customizing the In Box/Locator Report

The In Box/Locator Report can be customized to reflect the need of the user.

The Report Group Code, Organization, Request Action, NOA, and Status blocks contain a search feature. Highlight the block using the mouse or press the [Tab] key. Users will then enter one or two digits followed by the "%" sign and press the [Enter] key. The application will display a List Box. Highlight the correct entry and click the "OK" button to populate the block.

<u>EXAMPLE</u>. At the Army's Southeast region, the first two characters of the request number designate the location where the action was originated. For example, all the request numbers beginning with "MC", originated at Fort McPherson. A team leader wishes to generate a report containing all the performance awards processed for Fort McPherson during the last fiscal year. In addition to the Report Group Code block, the team leader would complete the following blocks on the In Box/Locator Parameter Screen:

- <u>Date Range</u>. Enter the month, day, and year in the "Start" and "End" blocks (e.g, 10-01-96).
- <u>Request Action</u>. Enter "MC%" in the "Request Action" block.
- <u>NOA</u>. Enter the specified nature of action (NOA) code, "887" , for a Performance Award.
- <u>Report Name</u>. Click "Locator" button.

The team leader may then click the "OK" button. The application will display page one of the report.

Previewing a Tracking Report

A “Previewer” screen allows users to view an entire report before they print it. Users can view the whole page at a time or see elements of the report. If the user decides they are ready to print after checking the pages, choose the “Print” button to open the “Print” dialog box. For illustration purposes, Figure 7-8 displays the “Previewer” screen for the PERSACTION Outstanding Actions Report.

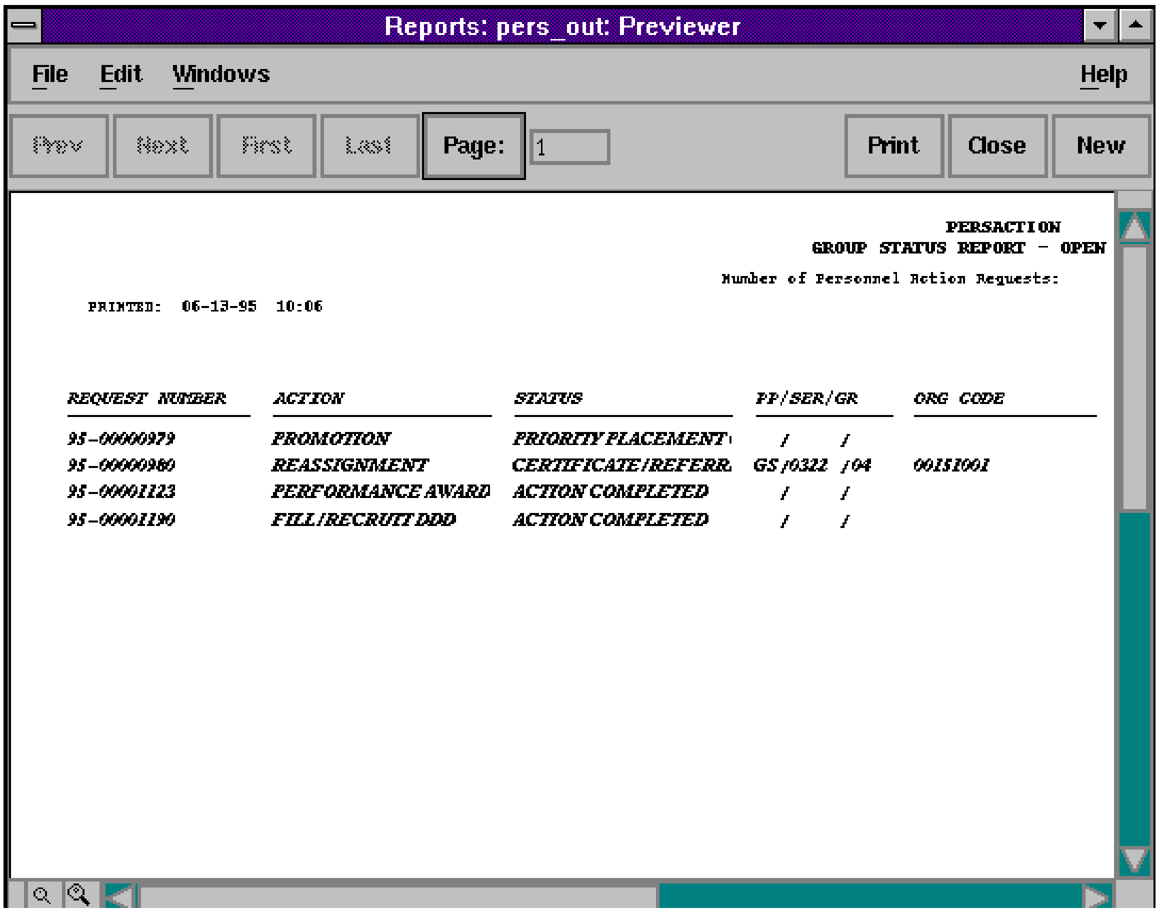

Figure 7-8. PERSACTION Report Previewer

In addition to the standard Windows elements found in PERSACTION, the “Previewer” screens contain a menu bar, seven command buttons, a page finder, two scroll bars, and a zoom feature. To return to the parameter screen, click “CLOSE”.

The Menu Bar contains four options: “File,” “Edit,” “Windows,” and “Help”. The Help option provides information on setting up a printer or saving the report to a file. To access one of these menu options, press the *underlined key* or click the option.

Use one or more of the following options to navigate through the “Previewer” screens:

- **Scroll Bars.** The horizontal scroll bar provides a view of the entire screen from the left to the right margins. To locate the last record on the report, drag the scroll box located between the arrows of the vertical scroll bar.

- **Zoom Feature.** The "zoom out" and "zoom in" options are located next to the horizontal scroll bar at the bottom of the "Previewer" screen. They provide the capability to focus on a specific section of the screen. To use the "zoom in" feature, click and drag the object to any point on the "Previewer" screen. The application then automatically enlarges that part on the report to 100%. Click the "zoom out" object to normalize the screen.

- **Command Buttons.** The "FIRST" and "LAST" options display the first or last page of the report, respectfully. The "NEXT" option moves the screen pointer to the first record on the next screen.
- **Page Finder.** The "Page Finder" option is located next to the "LAST" command button on the top of the "Previewer" screen. By entering a page number, such as "7," and clicking the "PAGE" command button, the application quickly moves the screen pointer to the first record on the designated page.

Printing a Tracking Report

In addition to viewing a report, the application allows users to print reports and save them to a file.

Selecting a Printer

If the name of the desired printer is not known, select "Choose Print" from the File Menu Bar located underneath the Title Bar in the "Print Job" dialog box. Figure 7-9 shows the "Printer Chooser" dialog box.

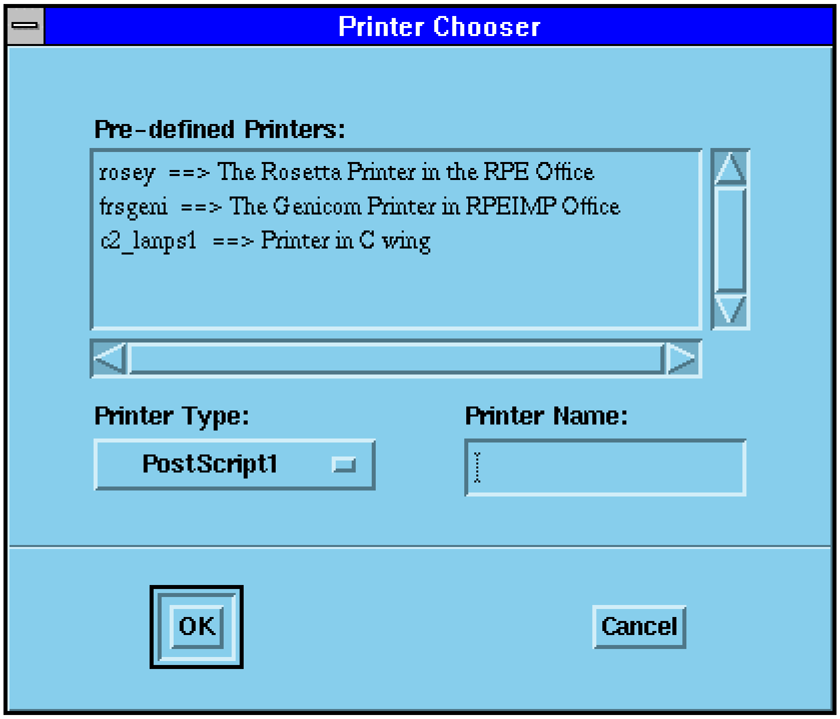

Figure 7-9. Choose Print Dialog Box

The "Printer Chooser" screen allows users to view a list of printers that are available. When the desired printer is located, the Printer Name must be entered into the block on the screen. Then click the "OK" command button to select the Printer Name. Again, to cancel the print job, click "CANCEL".

After printing the report, click "NEW" to return the application to the "Select A Report" dialog box to run a new report. To exit the report option, click the file menu and then select "QUIT" or click the "CLOSE" command button.

The Print Job Dialog Box

Click the "PRINT" button on the "Previewer" screen to activate the "Print Job" dialog box shown in Figure 7-10. The application assigns a default name to the print file. However, users may change a document's name for the purpose of saving it to a file. In addition to modifying the name of the file, they may also select a range of pages and the number of copies to be printed.

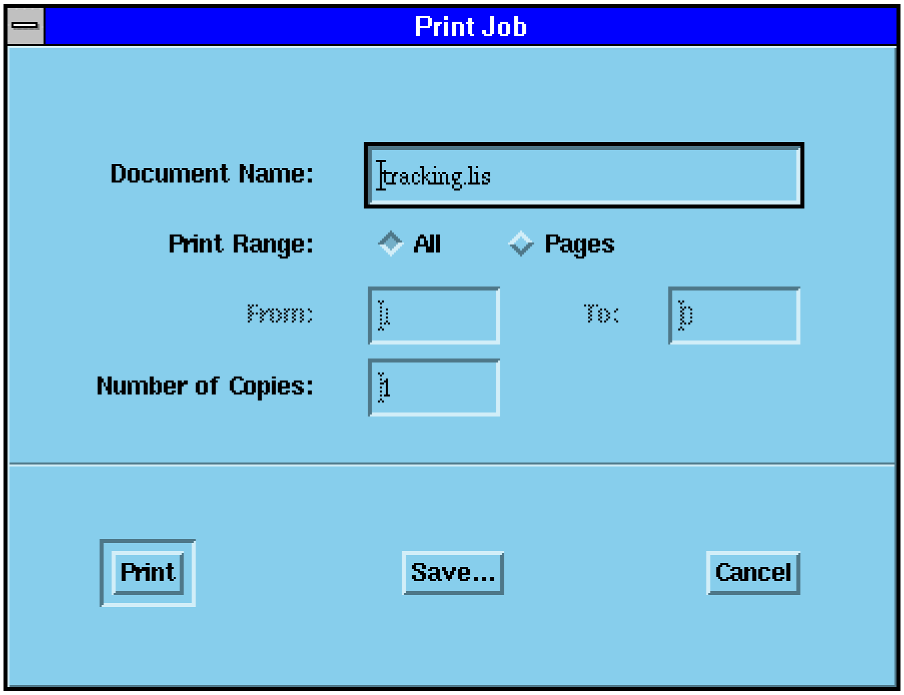

Figure 7-10. Print Job Dialog Box

As Figure 7-10 indicates, “Print Job” dialog box allows any user to print multiple pages, save a print file, and cancel a print job. It contains three command buttons.

- **Print.** To print all pages of a report, click the “ALL” button. Click the “PAGES” button to allow users to print selected pages of the report by using the “From” and “To” blocks. The application automatically prints one copy of the selected report. To print multiple copies, enter the desired number in the “Number of Copies” block.
- **Save.** To save a report to a file, click the “SAVE” command button on the “Print Job” dialog box. The application then displays a dialog box that allows user to select a drive, directory, and sub-directory where the report file is to be located. Users can also modify the filename before saving the report. The application saves all reports in a print format.
- **Cancel.** To cancel a print job, click the “CANCEL” command button.

The Save File Dialog Box

Click the "SAVE" button on the "Print Job" screen to active the "Save File Dialog" box shown in Figure 7-11.

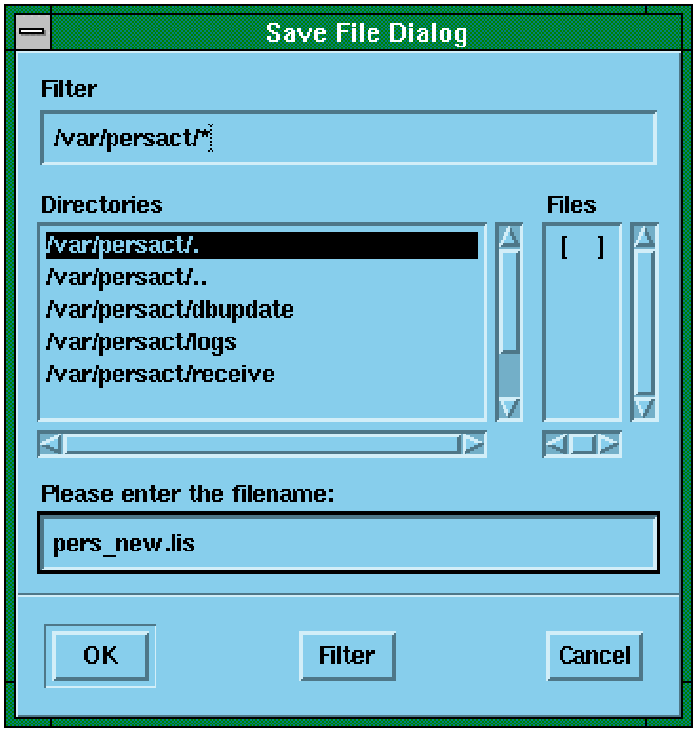

Figure 7-11. Save File Dialog Box

The application assigns a default name to the report. However, users may change a document's name for the purpose of saving it as a text file. To rename the file, highlight the file listed in the "Please enter the filename" block, and use the delete key to clear the block. Once the block is cleared, enter a new name for the report.

In addition to modifying the name of the file, users may designate the directory. To designate a different directory for the file, users must first highlighted the directory using the vertical and horizontal scroll bars. After the directory is highlighted, click the "OK" button to insert the file into the selected directory.

CHAPTER EIGHT: PERSONNEL OFFICE INSTRUCTIONS FOR PROCESSING A PERSONNEL ACTION REQUEST

This chapter is written for personnelists assigned to a Civilian Personnel Office.

This chapter describes how the Personnel Action Request interfaces with DCPDS. The DCPDS interface and "Help" menus aid the process of completing personnel actions while ensuring accuracy and consistency. When completed, the Personnel Action Request is a mirror of the Notification of Personnel Action (SF-50), which can be electronically transmitted to DCPDS.

General Instructions

Personnelists in the Civilian Personnel Office should review all the information in this chapter before attempting to process a Personnel Action Request action. Once management requests and authorizes an action, it is sent to appropriate users for processing. Ultimately, management sends the electronic version of the action to a designated person within the Civilian Personnel Office.

Access to PERSACTION

Normally, all individuals involved in preparing, reviewing, or authorizing personnel actions have access to PERSACTION application within the Integrated Functional Process Improvement (FPI) Suite. As noted previously, access is controlled by a Username and Password combination, while information access is controlled by permission tables within PERSACTION that limit the user's access to position and employee data and establish functional privileges for each user, such as the ability to edit or delete an action.

PERSACTION has two levels of access based on whether the user is a supervisor, manager or personnelist. Access to some blocks on the Personnel Action Request are restricted based on level of access. Additionally, the “PTI,” “DINs,” and “Remarks” buttons on the bottom of Page Five of the Personnel Action Request are accessible only by personnelists.

Personnelists with sufficient “edit” privileges have the capability to prepare a Personnel Action Request for final processing to DCPDS. Personnelists may also be given additional privileges, such as the ability to create, delete, print an action; specify a NOAC; send a transaction to DCPDS for processing; and close out an existing personnel action. Questions about access levels and permission tables should be referred to the local FPI Program Coordinator.

Editing a Personnel Action Request Action

To edit a personnel action, highlight the desired action and click the **“**EDIT” button at the bottom left side of the In Box screen.

The form shown on the screen is essentially identical to the paper form, except it appears as a series of five screens or pages. Users may press either the **[Tab]** or **[Enter]** key, or use the mouse to move from one block to another. They may also move to other pages by clicking the desired page number button on the lower left hand corner of the screen.

Some blocks on the Personnel Action Request have a help screen or list dialog box to assist in completing the block. The help screen or list dialog box can be accessed by clicking in the blank field next to the block. To select a value from the list dialog box, either click the selection or use the **[Down Arrow]** key to highlight the item on the list and then press the **[Enter]** key. The selected text is then inserted on the Personnel Action Request form.

Four command buttons are found at the bottom of pages one through four -- “OK,” “LIST,” “EMP DATA,” and “CANCEL.” These command buttons are described below:

- **OK.** This command button places the action in the In Box, including all changes made to the action.
- **LIST.** This command button is highlighted **only** if a user has access to the block. When the user selects a field and the “LIST” button is active, clicking it produces a list of options for that block.
- **EMP DATA.** Based on the user’s level of access, PERSACTION displays position and employee data downloaded from DCPDS. By clicking the "EMP DATA" command button, the application displays seven **"view only"** screens. Since most Conversion Due Dates, Temporary Appointment Dates, Time-In-Grade Dates, etc., are included in the Employee Data Screens, they are helpful in creating and processing personnel actions. **For more information, see the Employee Data Screen Section of Chapter Seven “Reports”**.
- **ATTACH.** This button allows users to attach a core document from the COREDOC system to an individual Personnel Action Request. *A Personnel Action Request must exist before a core document can be attached to it.* Once a Personnel Action Request has been created, a user can select the appropriate core document to be attached. After the user attaches a core document, the Personnel Action Request will then be flagged with a “Y” in the “C” column in the User’s In Box.
- **COREDOC.** This button allows users to create a new core document that will be attached to a Personnel Action Request. Once a core document is attached to a Personnel Action Request, only the user that created the core document can unattach or make modifications to it.
- **CANCEL.** This command button return users to their In Box **without saving** any changes made to the action.

Page One of the Personnel Action Request

Page One of the Personnel Action Request consists of "Part A - Requesting Office" information and the first four blocks of "Part B - For preparation of SF-50". Individuals in the Civilian Personnel Office with "edit" privileges have the capability to change the values for any of the blocks in Part B of the form (see Figure 8-1).

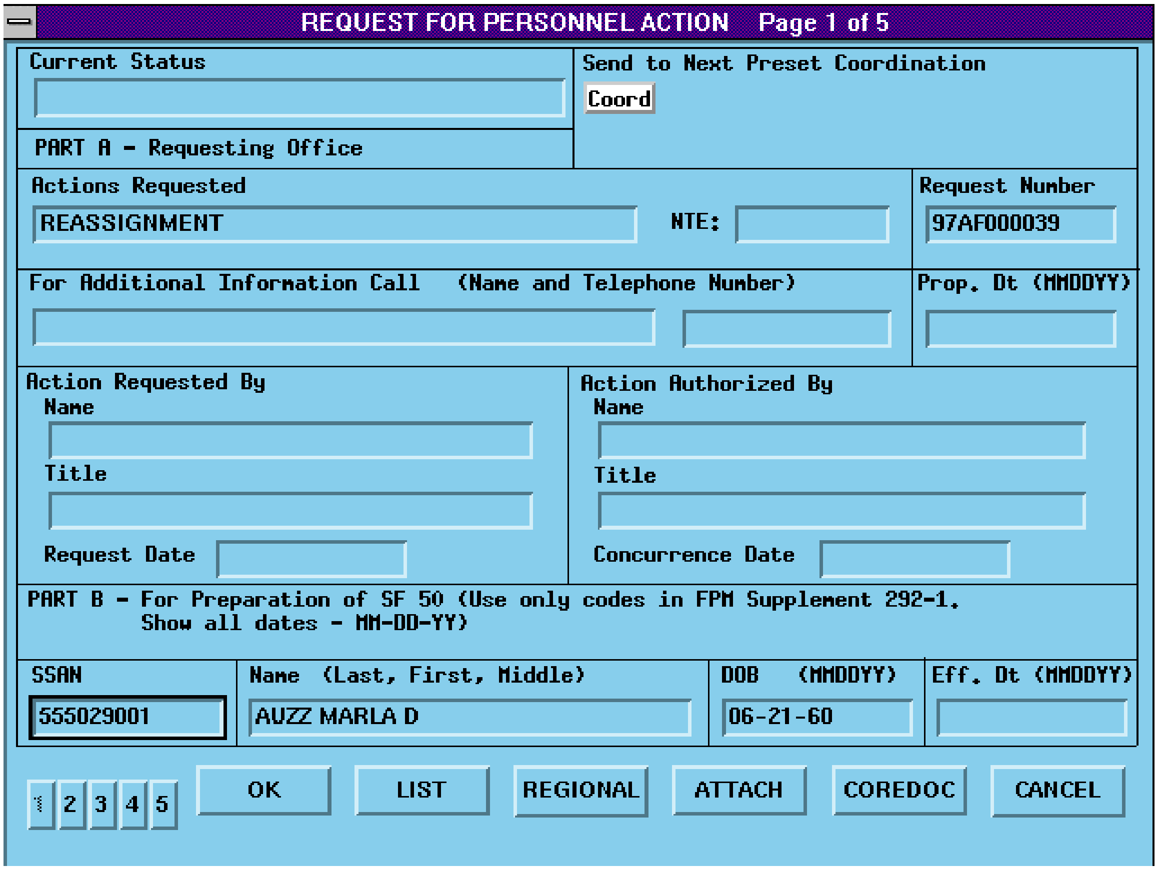

Figure 8-1. Request for Personnel Action, Page One

Part A - Requesting Office

This section of the action contains information concerning the Type of Action, Request Number, Point of Contact for the Action, Effective Dates, and Signature Blocks for Requesting and Approving officials. Management needs to complete the "Type of Action Requested" and "Action Authorized By" blocks prior to coordinating a Personnel Action Request to the Civilian Personnel Office. The Request Number is automatically assigned by the application and cannot be modified.

Actions Requested Block. The manager enters an "Actions Requested Type" from a list that best describes the action. If "FILL/RECRUIT" is selected, the application prompts the manager to enter the name of individual who previously held the position being filled.

Part B - Preparation of the SF-50

The four blocks in Part B of Page One of the Personnel Action Request are described below.

Name, Social Security Account Number and Date of Birth Blocks. The "SSAN" and "Name" blocks are related. This block is completed if the action involves a current employee.

Searching for an Employee Record. To enter information from an employee's record onto the Personnel Action Request form, use the following steps:

1. Place the cursor in the "SSAN" block. Click the "LIST" command button that is located at the bottom of the page, which creates an alphabetical listing of employees in the user's organization, along with their Social Security Account Numbers, Pay Plan, Series, and Grade.
2. Click the scroll bar or use the **[arrow]** keys to locate an employee's record. A find feature may also be used. To use "FIND," enter the first few letters of the employee's last name and click the "FIND" command button. PERSACTION highlights the first record containing an employee's last name that begins with the letters input by the user.
3. Click the selected employee's SSAN/Name line and then the "OK" button. The application then populates the SSAN, Name, and Date of Birth blocks on this page. It will also populate the organization, position, and employee blocks on the Personnel Action Request form.

Completing the SSAN block for New Employees. If users are processing an accession action from outside the serviced population, the personnelist must enter the employee's Social Security Account Number into the "SSAN" block. The application indicates if the "SSAN" is not found in the data base and then queries the users if they wish to proceed. When the users indicate an affirmative response, the application allows them to enter the Name and Date of Birth in the blocks.

Effective Date. The personnelist enters the month, day, and year that the action is effective in this block. The application allows the personnelist to enter any date in this block.

Attaching a Core Document. Once the Personnel Action Request has been created, users can select the "ATTACH" button, which will display all the core documents that were created by that user. The user can then select the appropriate core document to be attached. Once the user attaches a core document, the Personnel Action Request will then be flagged with a "Y" in the "C" column within the PERSACTION In Box. **Only the user that created the core document or the COREDOC System Administrator can edit or attach/unattach a core document.**

If the user wishes to attached a different core document, they can select the "ATTACH" button again. A pop-up window will then appear. Click the "ATTACH NEW" button. The application will again provide the user with a list of the core documents that were previously created.

If the user needs to unattach the core document, they can select the “ATTACH” button again. This time the user should select the “UNATTACH” button.

Page Two of the Personnel Action Request

This page is a continuation of Part B of the Personnel Action Request (see Figure 8-2). Several of the blocks in this part are restricted for only Civilian Personnel Office use. Managers complete the “To side” of Part B only if the action type establishes a new position.

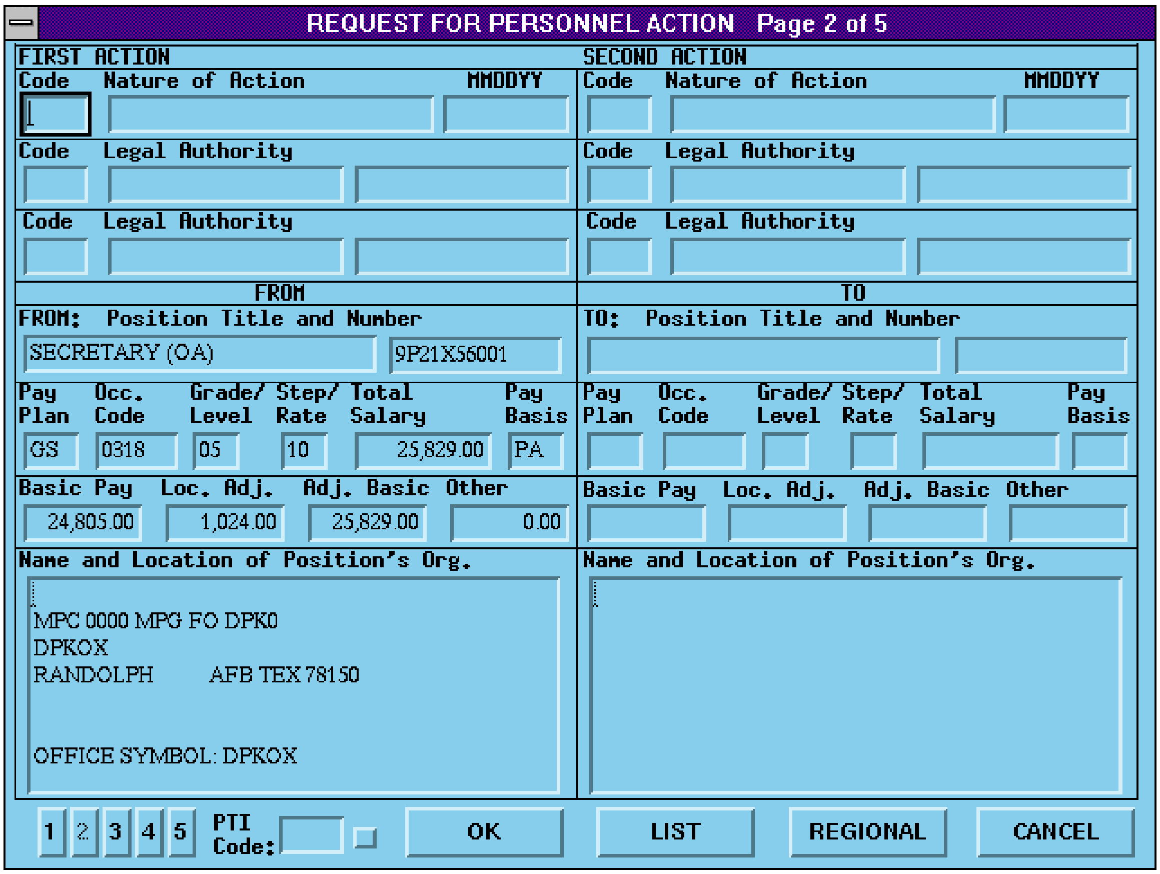

Figure 8-2. Request for Personnel Action, Page Two

Nature of Action and Authority Code blocks

The Nature of Action and Authority Code blocks must be completed before the Personnel Action Request is approved. PERSACTION is a “Nature of Action” driven application, which means that the “DIN” and “REMARKS” buttons are not activated unless an appropriate “Nature of Action Code” is entered on page two.

If the NOAC is known, enter a four-digit code. The application then inserts the clear text from the DCPDS table, such as “Promotion” for code “0702.” If the Authority Code is known, enter a three-digit code and the application displays the corresponding clear text. For example, if Authority Code "N6M " is input, the text "Reg 335.102 Career Prom." is displayed.

If the NOAC or Authority is unknown, click the block and the application displays a help table containing a list of NOACs or Authority Codes with corresponding clear text. Use the scroll bar to locate the appropriate Nature of Action or Authority, highlight the selection, and then click the "OK" button to insert the selection into the Personnel Action Request.

"From Side" of the Personnel Action Request

The "From Side" of the Personnel Action Request contains Position Title and Number, Pay Plan, Occupational Code, Grade/Level, Step/Rate, Salary; and Name and Location of the Organization where the position is located.

If a "SSAN" and "Name" are selected from a "list" box, the "From" information in blocks 7 through 14 are populated with information from DCPDS. If the action does not involve a current employee, these blocks are left blank.

Managers will not have the capability to edit any of the "From-Side" information. If they find information that is incorrect, they may annotate the correct information in "Remarks by Requesting Office" block on Page Four of the Personnel Action Request.

"To Side" of the Personnel Action Request

The "To Side" of the Personnel Action Request contains the following blocks -- Position Title and Number, Pay Plan, Occupational Code, Grade/Level, Step/Rate, Salary, and Name and Location where the position is located.

Completing the Position Blocks. To pull information from DCPDS, click the second block underneath the “TO: Position Title and Number” heading. The application then displays a screen that asks whether the user would like to choose from “Encumbered” or “Unencumbered” positions (see Figure 8-3).

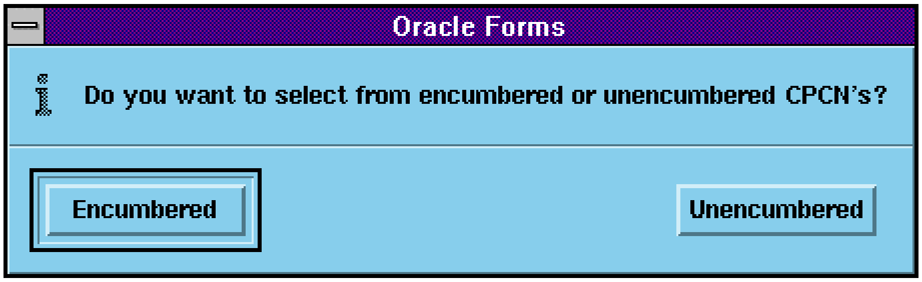

Figure 8-3. Oracle Forms Message Box

When the user indicates the selection, “encumbered” CPCNs, the application displays the screen shown in Figure 8-4.

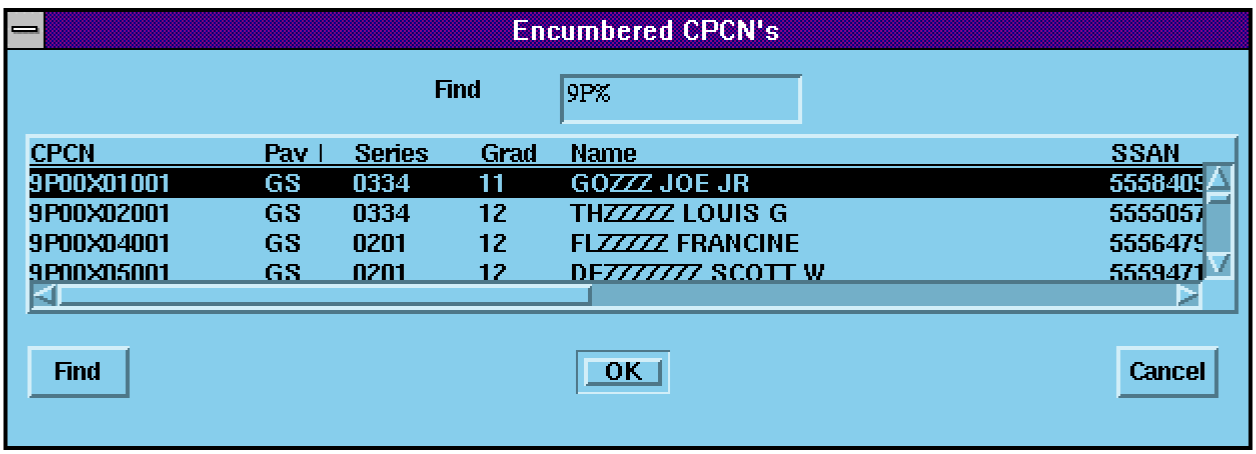

Figure 8-4. Encumbered Position Dialog Box

Positions are listed in numerical order by Civilian Personnel Control Number (CPCN). To view the entire list, scroll through the list or use the “Find” feature, and identify the position that is to be filled. Click the horizontal scroll bar to view additional information about the position record. Highlight the position record and click the “OK” command button, which populates position information from DCPDS onto the “To Side” of the form.

Using the “Find” Feature. Click the “FIND” command button and the application displays a find dialog box. Move the cursor to the “Find” block and type part or all of the CPCN before the percent sign. The application then highlights the first record that most closely matches the data in the “Find” block. Click the selection and then the “OK” command button inside the dialog box to pull the selection onto the form.

Establishing a New Position. To establish a new position, complete the position information, such as Position Title, Pay Plan, Occupational Code, Grade, and Step. The Name and Location of the organization where the position is located must be completed using the “List” feature. This list includes all organizations that are in DCPDS and under the user’s organizational component.

Name and Location of Position’s Org. The Organization Dialog Box (shown in Figure 8-5) is automatically generated when the “Name and Location of Position’s Org” block on the Personnel Action Request is selected.

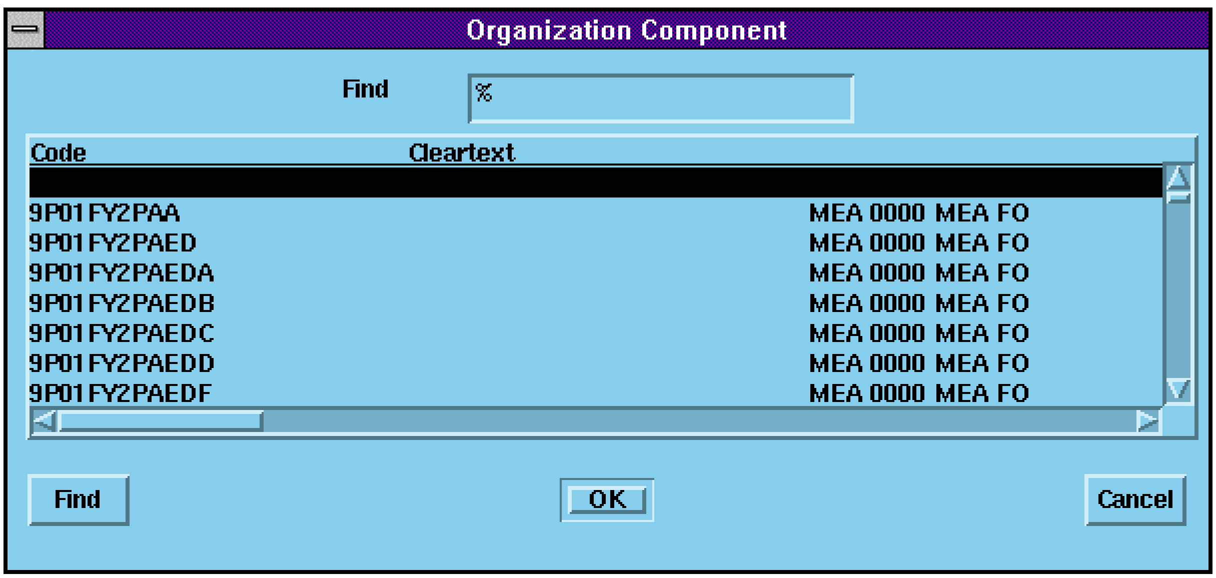

Figure 8-5. Organizations Dialog Box

The organizations in the dialog box are shown in organizational component order. To locate an organizational component, use either the scroll bar or “Find” feature. When the organization is located and highlighted, click “OK” to select it. The application will then populates the action with position data and organizational information from the reference table in DCPDS.

Page Three of the Personnel Action Request

This page, a continuation of Part B of the Personnel Action Request, is divided into two sections -- EMPLOYEE DATA and POSITION DATA. See Figure 8-6.

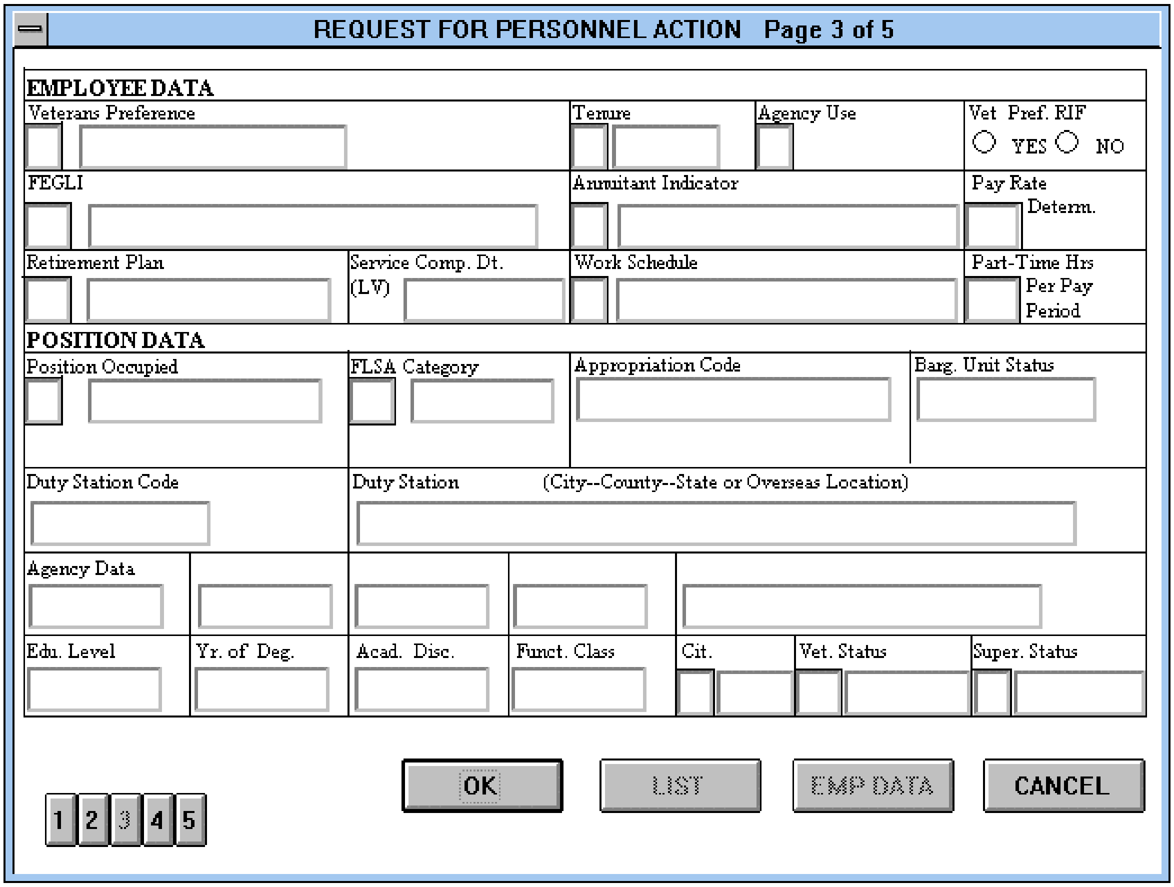

Figure 8-6. Request for Personnel Action, Page Three

If the Personnel Action Request pertains to an employee currently in the system, the blocks on this page are automatically populated with information relating to that employee's record from DCPDS.

To edit any of these blocks, click the block to be edited. Click the "LIST" command button to generate a dialog box containing a list of appropriate values for the block. To select a value, highlight the desired code and click the "OK" command button.

Employee Data

This section contains blocks for an employee's Veterans Preference; Tenure; Agency Use; Veteran Preference for Reduction in Force (RIF); FEGLI; Annuitant Indicator; Pay Rate Determinant; Retirement Plan; Service Computation Date; Work Schedule; and Part-Time Hours per pay period. Managers have access to the Work Schedule and Part-Time Hours blocks, while personnelist can enter data into any of these blocks. A Help window is available for each block and is accessible by moving the screen pointer to a block and clicking.

Position Data

The Position Data section includes Position Occupied, FLSA Category, Appropriation, Bargaining Unit Status, Duty Station, and Code. These blocks are populated with data from DCPDS when users request an action on a current employee. Users can complete these blocks when the Action Requested block reads “FILL/RECRUIT” position.

Agency Data

The Agency section of this form contains blocks that identify the employee’s Educational Level, Year of Degree, Academic Discipline, Citizenship, and Veterans Status. This section also contains Functional Class and Supervisory Status position blocks.

Agency Data Blocks 40 through 44. These blocks are normally used to add position or pay information not found on the Personnel Action Request. The information in these blocks generally will vary based on the user’s DoD Component or Agency. These blocks do not have any help screens and personnelists should refer to local instruction for completing them.

Page Four of the Personnel Action Request

As shown in Figure 8-7, page 4 contains two parts -- C and D. Part C is used by the Civilian Personnel Office to record the personnel who have reviewed the Personnel Action Request. Part D is used by supervisors and managers to enter additional or conflicting reasons for an employee's resignation/retirement, or to annotate special circumstances surrounding the processing of the action.

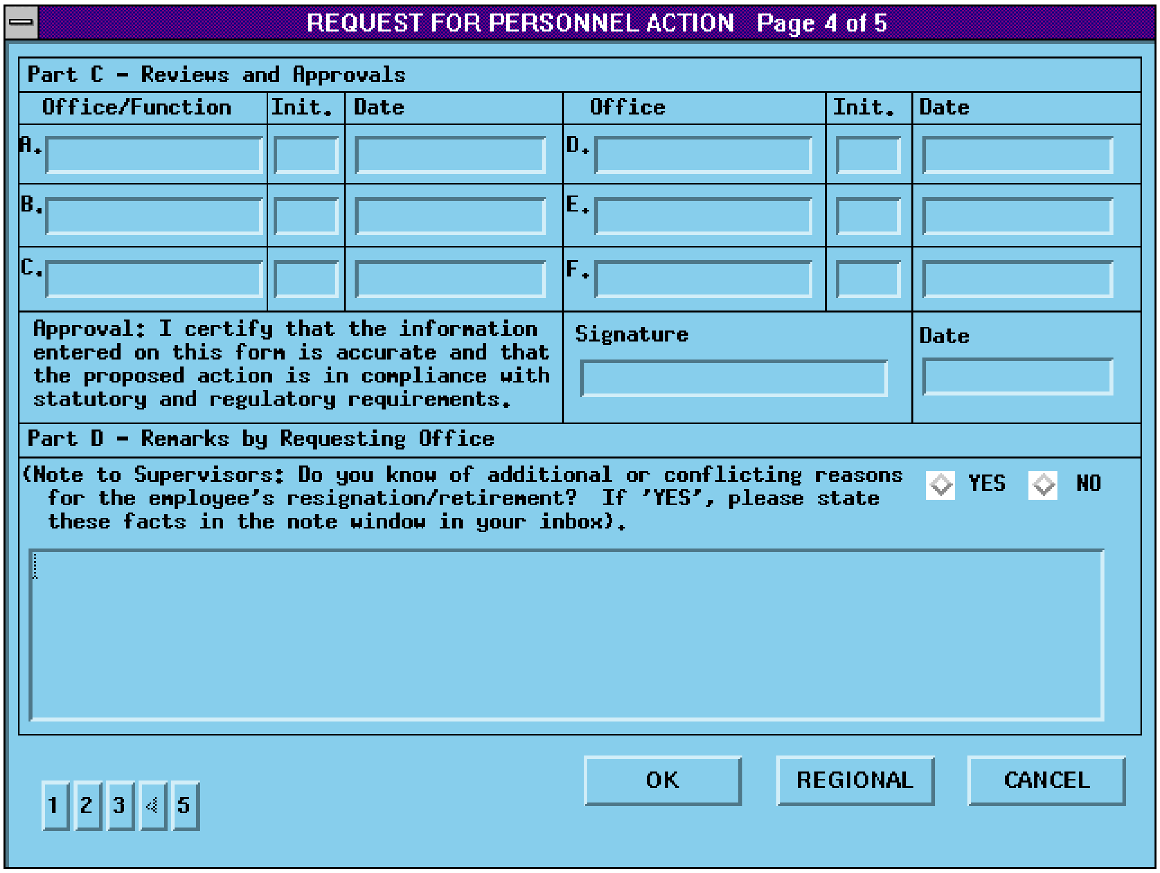

Figure 8-7. Request for Personnel Action, Page Four

Part C - Reviews and Approvals.

Personnelists use these blocks to indicate reviews and clearances for a Personnel Action Request. The Personnel Action Request allows for six levels of review within the personnel office. The process of approving an action is discussed later in this chapter (see section entitled, "Approving a Personnel Action Request").

Part D - Remarks by the Requesting Office

Supervisors, managers, and manpower personnel use Part D to enter any additional remarks that could be important to the resource management or personnel office staffs. For example, it could be used to document changes to Work Schedules, Appropriation Codes, and Duty Station Codes, or, if requesting an award, to Amount and Type of Award. Managers may use this part to recommend recruitment sources or document whether relocation services may be used for filling the position outside the commuting area.

Page Five of the Personnel Action Request

Page Five of the Request for Personnel Action consists of two parts -- E and F (see Figure 8-8). Part E is used to document the reasons for an employee's resignation or retirement, while Part F is used to add any remarks on the form. Refer to the section entitled, "Processing Remarks" later in this chapter for detailed instructions on how to enter remarks into Part F.

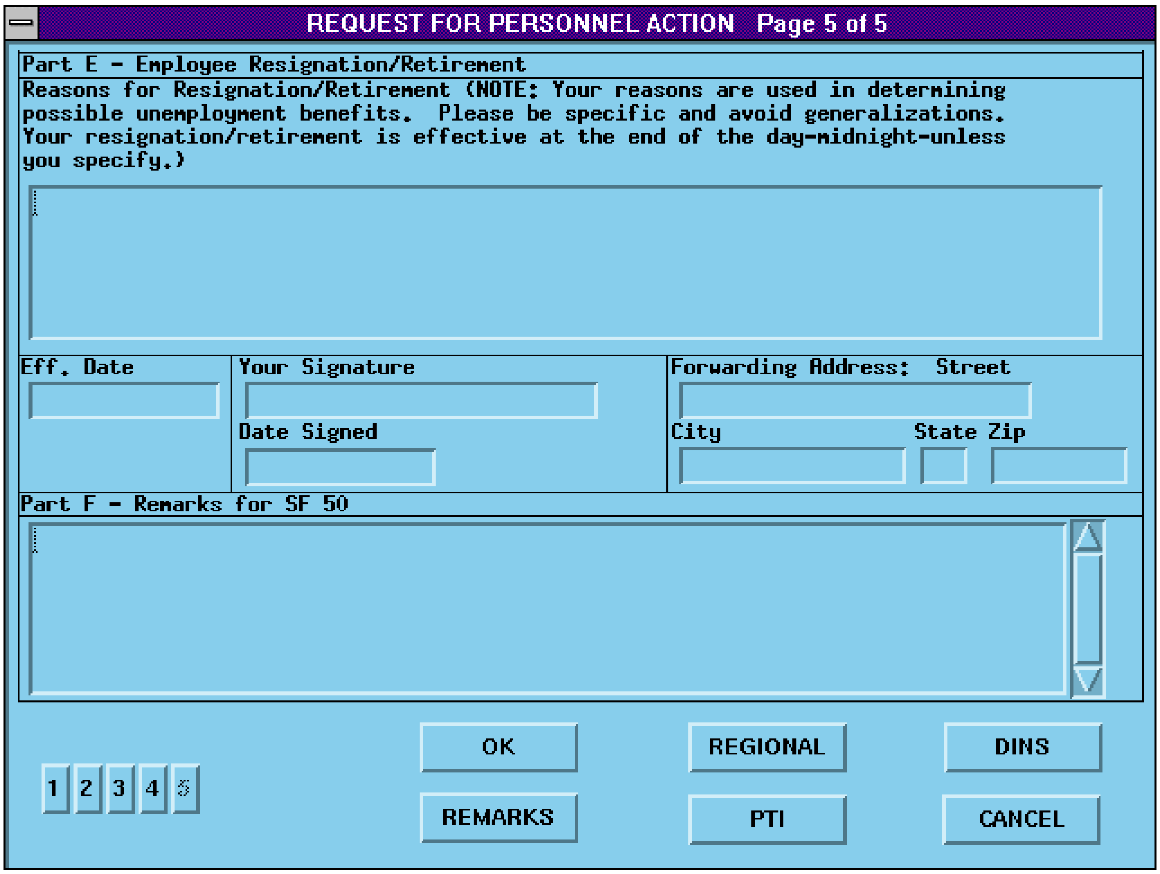

Figure 8-8. Request for Personnel Action, Page Five

Part E - Employee Resignation/Retirement

Users have access to this part of the form when "Resignation", "Retirement", or "Other" is input for the "Actions Requested." When processing a separation action for an employee, managers or personnelists should complete Parts A, B, C, and D of the form, print those parts, and have the employee complete and sign Part E. The signed Personnel Action Request form is then forwarded to the personnel office.

The user should indicate in Part D that the hard copy of the action is being forwarded separately. Either the manager or employee includes the following information in Part D -- Employee's Reason for Resignation, Forwarding Address for the Employee, and Proposed Effective Date of the Action.

Completing the DIN Screens

The "DIN" screens enable personnelists to enter the data needed for the PTI string (see Figure 8-9). Each time a NOAC is entered at the top of page two, the application creates a set of "DIN" screens for the corresponding PTI. PERSACTION displays all Required and Optional DINs for a NOAC from DCPDS Table Nine. It also automatically transfers data on the Personnel Action Request from the Personnel Action Request to the "DIN" screens when the "DIN" command button is selected.

Dual Nature of Actions. In cases where dual NOACs exist, users should enter them when they complete the hard copy Personnel Action Request. However, the PTI displayed on the "DIN" screen is for the first NOAC entered on page two, although the application includes the DINs for both actions.

Required DINs are listed first in alphabetical order by their three digit DIN identifier and are shown in one color. DCPDS uses Required DINs to update transactions. PTIs use Mandatory DINs, which are established by a DoD Component or agency, to update the record in DCPDS. All Mandatory DINs are listed after the Required DINs in alphabetical order and in another color. Optional DINs are listed last and have a white background.

A small button at the left side of the screen controls whether the DIN is sent to the PTI Editor. Clicking this button places an **"X"** in the block and transmits the DIN and associated data to the PTI Editor screen for later update to DCPDS. The buttons for the Required DINs are always on, while the buttons for all the Mandatory and Optional DINs are always off. The Mandatory and Optional DINs can be turned on if they are required to complete the PTI.

WARNING. The “DIN” button must be activated to send the DIN and its associated data to the PTI Editor screen. When a personnelist enters data into the DIN block and presses the **[Enter]** key, the application will automatically activate the DIN button. Users are cautioned **NOT** to press the **[TAB]** key after entering data into the DIN block.

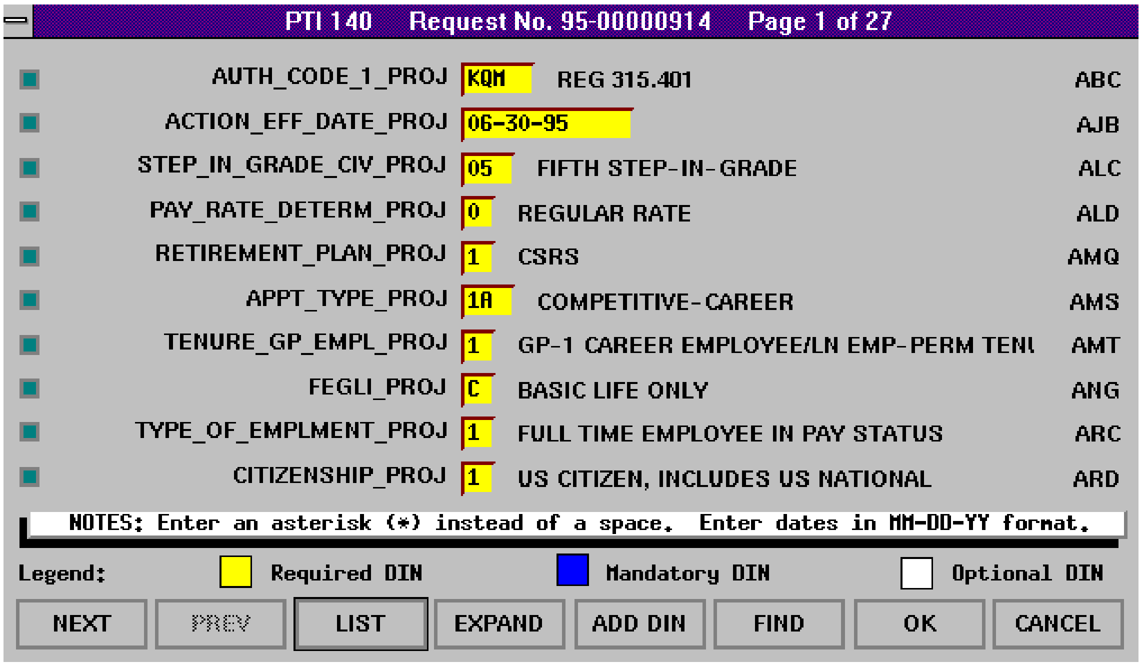

Figure 8-9. DIN Screen

Figure 8-9 shows the first of several DIN screens for a PTI 140 action. The screen contains standard window elements and seven command buttons that are described below.

- **NEXT/PREV.** This option enables a personnelist to move to another screen. When the first screen is being used, the “PREV” command button is dimmed.

- **LIST.** This option allows a personnelist to view a Central or Local DCPDS Table for the selected DIN. If the “LIST” command button is dimmed, a corresponding table does not exist.

- **EXPAND.** The application provides the PERSACTION Program Coordinator with the capability to remove optional DINs from the “DIN” screen for a particular PTI. This option gives personnelists the capability to select optional DINs from Table Nine.

- **SHRINK.** This option allows personnelist to deselect the “EXPAND” option.

- **ADD.** This option allows personnelists to add a DIN. It also allows the user to delete previously added DINs.

- **FIND.** This option allows personnelists to locate a DIN that is associated with the NOAC designated on the Personnel Action Request.

- **OK/CANCEL.** The "OK" option saves all the changes to the DIN screen and returns personnelists to Page Five of the Personnel Action Request, while the "CANCEL" option return them to the form, **WITHOUT** saving the data entered onto the "DIN" screens.

Inserting DIN Data

As noted previously, "DIN" screens are available to personnelists only after the NOAC is entered onto page two. All data previously entered on the Personnel Action Request has flowed to the DIN blocks.

To access the "DIN" screens, go to page five and click the "DINs" command button. If a Central or Local Table exists in DCPDS that corresponds to a DIN, the "LIST" command button is then activated. If a table does not exist, the "LIST" command button is dimmed and the information must be keyed into the space allocated. Always enter dates in the MMDDYY format; PERSACTION enters all hyphens and converts the date to the proper format for updating DCPDS.

CAUTION TO THE USER: Central and Local Tables in DCPDS are subject to change at least biannually. Therefore, it is strongly recommended that personnelists use the "List" feature to select a value for a DIN element.

Using the "Find" Feature. The "Find" feature allows personnelists to quickly locate a DIN identifier. To use the "Find" feature, click the "FIND" command button. The application then displays the Find Dialog Box. Move the cursor to the "Find" block and type part or all of the information before the percent sign. The application then highlights the first record that most closely matches the data in the "Find" block.

For example, if personnelists want to locate a Defense Acquisition Workforce Improvement Act (DAIWA) DIN, they may input the "D" before the percentage sign. Clicking the "FIND" command button executes the "Find" feature option. As shown in Figure 8-10 below, the application displays the first DIN identifier that starts with the letter "D" for the designated PTI.

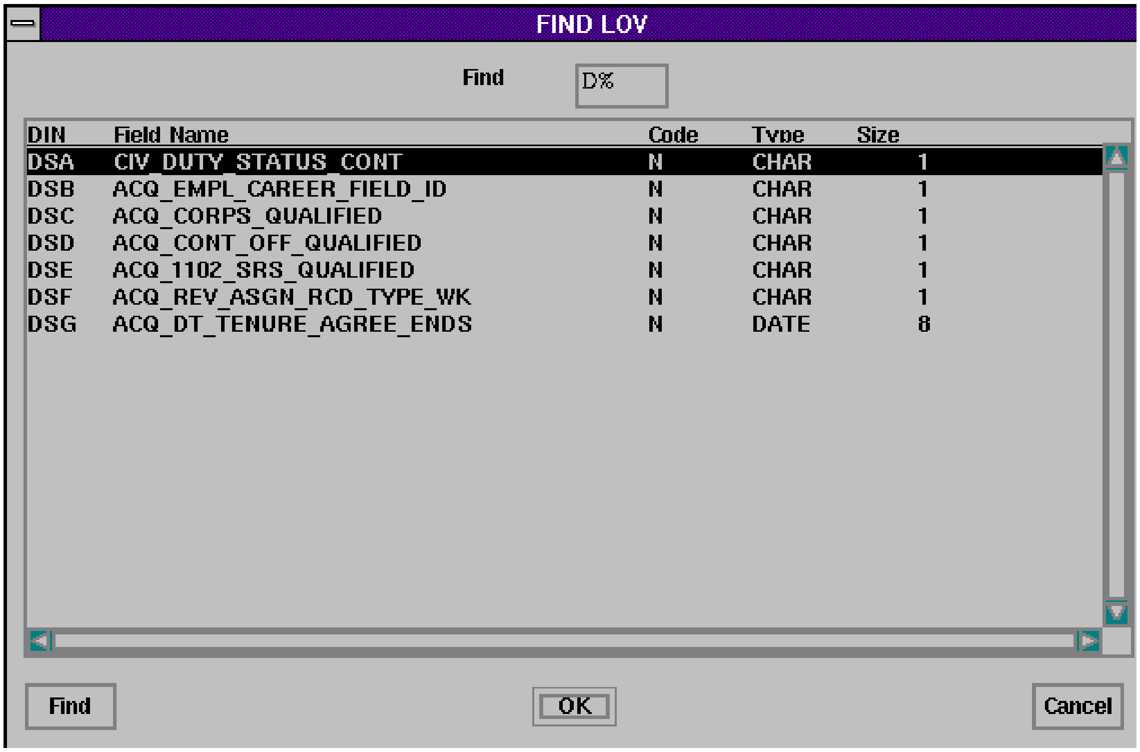

Figure 8-10. Find Dialog Box

Click the selection and then the "OK" command button inside the dialog box to pull the selection onto the form.

Adding and Deleting DINs

Personnelists may have a requirement to submit DINs that are not listed on Table Nine for a designated PTI. For those situations, enter the three-digit DIN identifier in the appropriate block and click "OK." The DIN is then added to the end of the "DINs" screens. Personnelists should use this option after all the other DINs have been inputted for the PTI.

Click the "ADD DIN" command button and the application will display an Oracle Forms Dialog Box that states: " All changes to the form will be saved". Click the "OK" button to continue. The application will then display Figure 8-11.

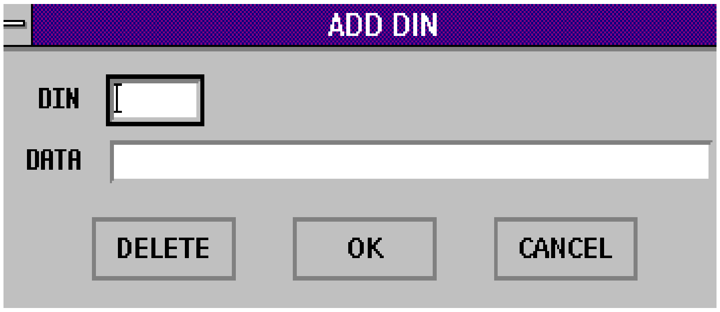

Figure 8-11. ADD DIN Dialog Box

This figure contains DIN and DATA blocks, and three command buttons. Click "CANCEL" to return the application to the "DIN" screen.

From this dialog box, personnelists may add a DIN to the "DIN" screen. They may also use the "DELETE" option to remove a DIN that was added to the DIN screen using this dialog box.

To add a DIN, insert a three digit DIN identifier and press the **[Enter]** key. The application shifts to the DATA block, where personnelists can input a text associated with that DIN identifier. PERSACTION does not edit these additional DINs so extra care must be taken to ensure the data is accurate and in the correct format. Click "OK" to insert the DIN and its clear text on the last page of the "DIN" screen. After completing the "DIN" screen, click "OK" to return to page five.

Processing Remarks

Remarks may be added by clicking the "REMARKS" command button, at the bottom of page five. When this button is clicked, the application displays a warning message that all the changes on the form will be saved. After selecting "OK", the application displays a dialog box (see Figure 8-12).

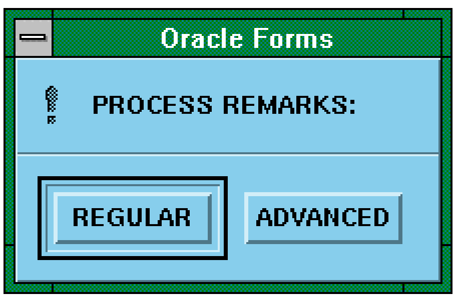

Figure 8-12. Process Remarks

The application then enables the personnelist to select one of two options for selecting remarks -- "REGULAR" and "ADVANCED." The "REGULAR" option allows personnelists to add remarks one at a time. The "ADVANCED" option is designed for personnelists who are familiar with how remarks are submitted to DCPDS.

Regular Remarks

After selecting "REGULAR", the application displays the "Remarks Processing" screen shown in Figure 8-13. This screen allows personnelists to "Add," "Change," "Delete," and "View" the remarks as they appear on the Personnel Action Request. The "MEMO" Button allows users to store data insertions for the SF-50. The memo field is easily accessible and updatable from both the "REGULAR" and "ADVANCED" Remarks areas. The memo field is also accessible and updateable from Part F (remarks for SF-50) of the SF-52 (Figure 8-13.a). Users can enter up to 200 characters in the Memo screen.

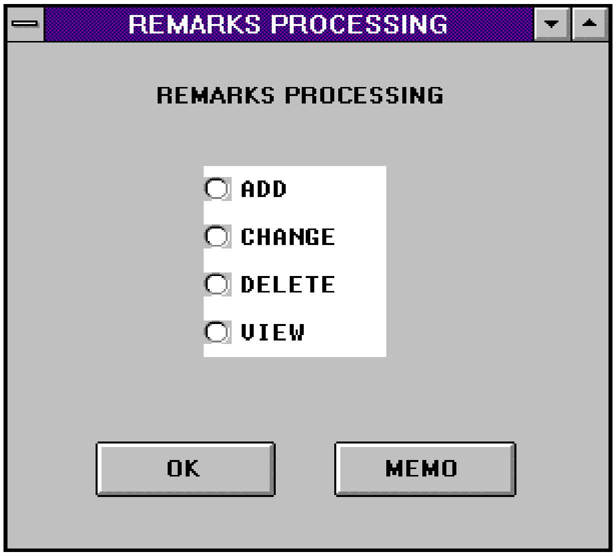

Figure 8-13. Remarks Processing Menu

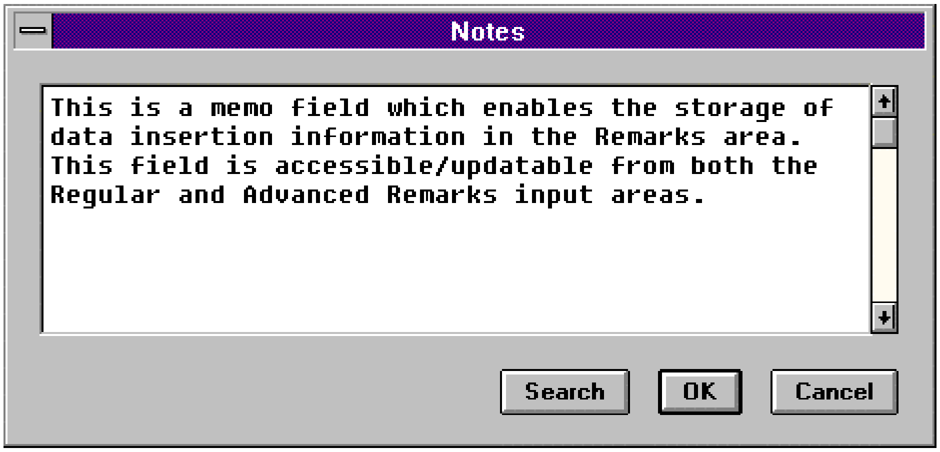

Figure 8-13.a. Memo Screen

Choosing a Remarks Table.

The “Change,” “Delete,” and “View” options are accessible if remarks were previously selected for the action. To select particular remarks, click “ADD” and then the “OK” command buttons. The application displays a menu that enables personnelists to select remarks from a Central or Local Table in DCPDS (see Figure 8-14). **PERSACTION allows personnelists to add remarks from both tables for a particular Personnel Action Request**.

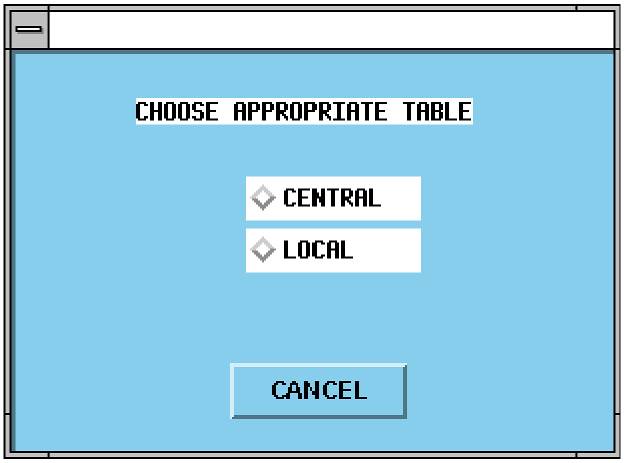

Figure 8-14. Remarks Table Menu

To select a table, click either “CENTRAL” or “LOCAL.”

Adding a Remark

Figure 8-15 shows the “Add Remarks” screen. This screen contains a four-digit code block, a clear text block that corresponds to the remarks code, and four command buttons. The “SELECT” command button allows personnelists to select a remark from the table.

Personnelists click the “LIST” command button to obtain a list of remarks. They can also scroll through the list or use the “Find” feature to locate the appropriate remarks. Users must navigate through the SF50 Codes screens before the “Remarks from Central Table” Screen is displayed.

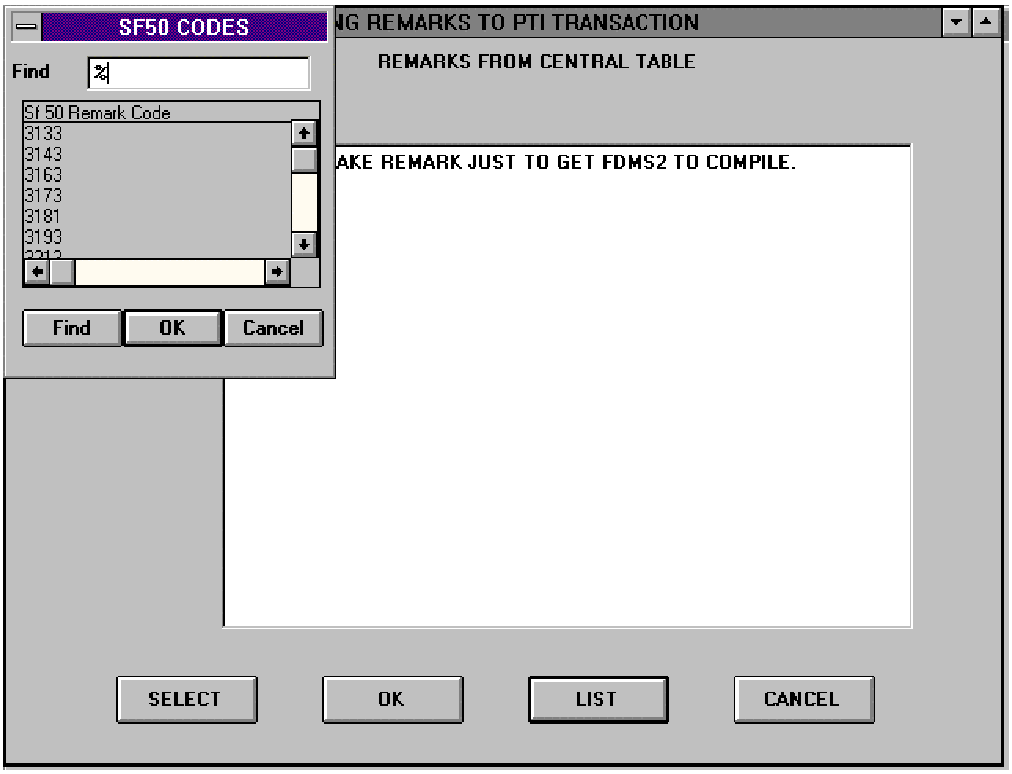

Figure 8-15. Adding Remarks to PTI Transaction

Personnelists also have the option of typing in a four-digit remark code. Once a particular remark has been located, click “SELECT.” If there are insertion DINs for that remark, Figure 8-16 appears and prompts the personnelist to complete the information for the insertion DIN. To save the information to the PTI and Personnel Action Request, click “OK” at the bottom of the screen. The remark, along with the insertion DINs, are then added to the action.

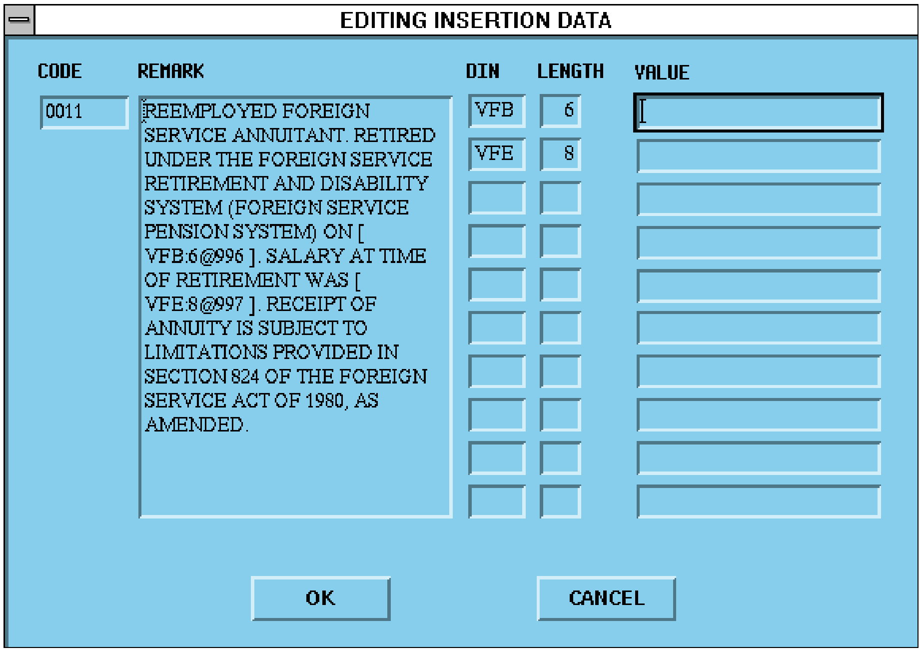

Figure 8-16. Editing Insertion Data

Continue this process until all remarks have been selected and then click “OK”. Upon returning to the Personnel Action Request, note that the Remarks Codes are now included in Part F.

If the “CANCEL” command button is selected, DIN(s) will not flow to either Part F of the Personnel Action Request or the PTI Editor.

Changing a Remark

The “Change” option may be selected from the “Remarks Processing” menu (see Figure 8-14). This option changes the values previously inputted through the “Add” process discussed earlier in this chapter. Figure 8-17 shows the “Select Remarks to Change Insertion DINs” screen. By using the **[Arrow]** keys, personnelists can locate a particular DIN identifier. By clicking “SELECT,” all insertion data information are displayed on the screen.

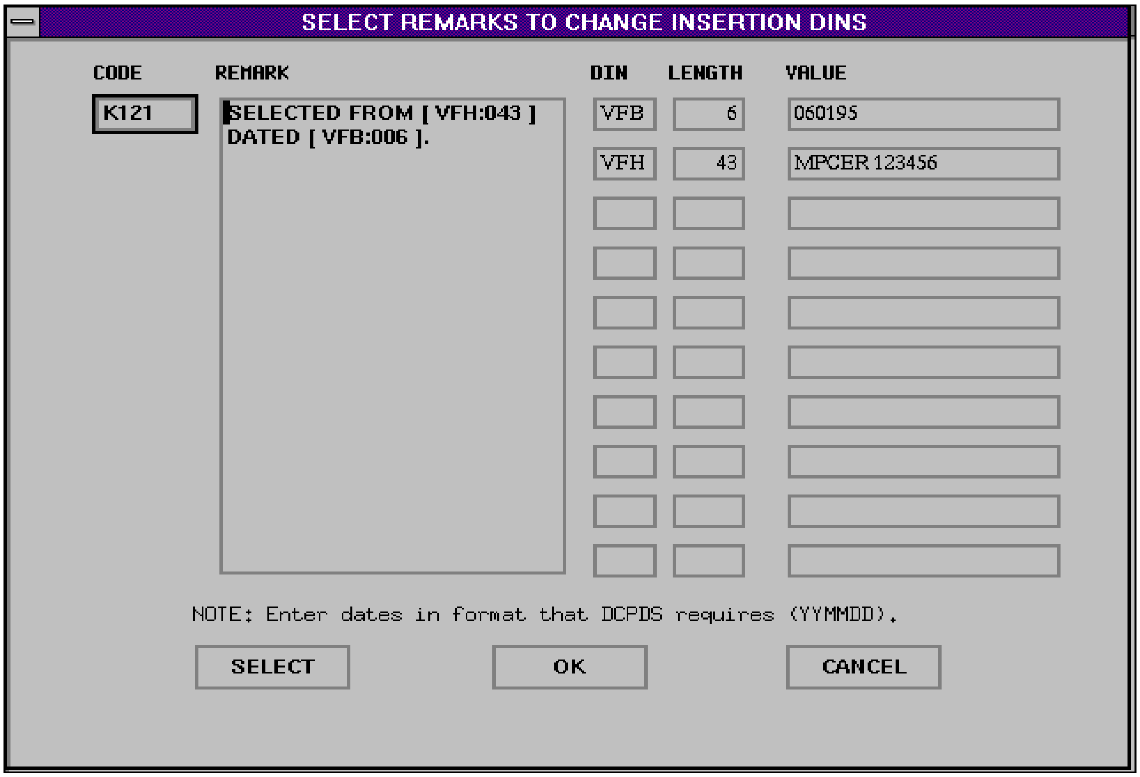

Figure 8-17. Change Remarks Screen

To edit a value for a DIN, click the “Value” block. Personnelists may also press the **[Delete]** key to remove data in the block and type in a new value. This screen requires that the dates be entered as year-month-day (YYMMDD). Click “CANCEL” to return the application to the “Remarks Processing” menu **without** saving the user’s most recent input.

Deleting Remarks

Remarks may be deleted by clicking the “DELETE” command button located in the “Remarks Processing” menu (Figure 8-13).

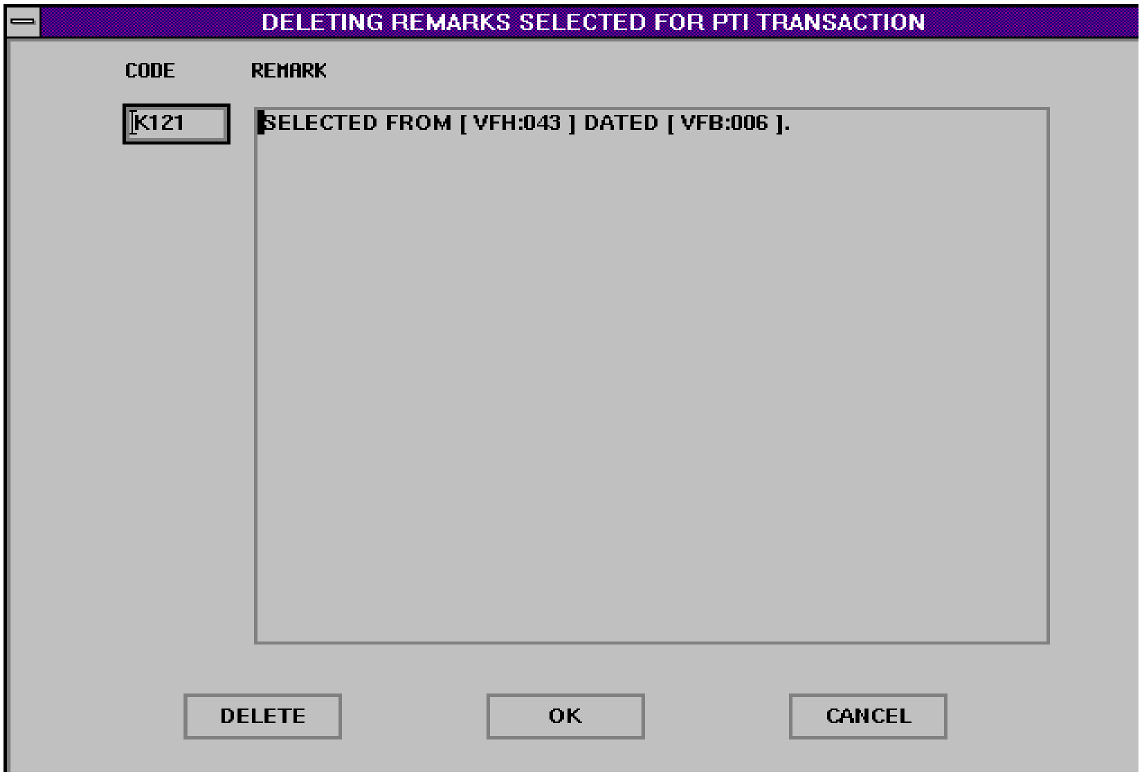

Figure 8-18. Delete Screen

The application then displays the first remark on the Personnel Action Request (see Figure 8-19). To locate other remarks, use the **[Down Arrow]** keys. After the remark is located, click “DELETE” to remove the remarks. Continue this process until all remarks have been deleted. Click the “OK” button to return the application to the “Remarks Processing” menu.

Viewing Remarks

To view previously entered remarks, click the “VIEW” command button that is located on the “Remarks Processing” menu.

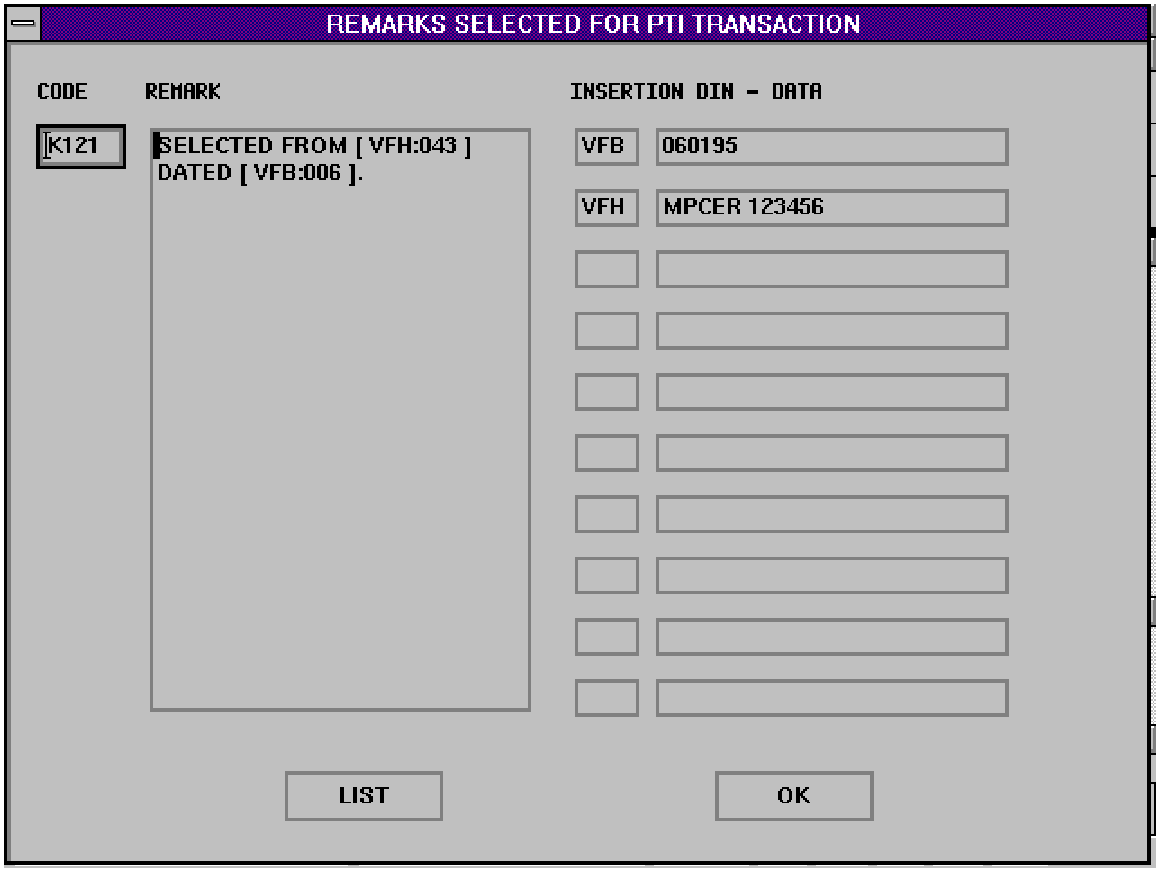

Figure 8-19. View Screen

When “VIEW” is selected, personnelists may view each of the remarks selected for a Personnel Action Request. When the “LIST” command button is clicked, the application displays all the remarks.

Personnelists may use the **[Arrow]** keys to scroll through the remarks or they may click the “LIST” command button to obtain a list of remarks. They can then scroll through the list or use the “Find” feature to locate the appropriate remarks. However, personnelists **cannot** change, delete, or add remarks from this screen when using view.

Advanced Remarks

Figure 8-20 shows the Quick Remarks screen. This screen is for personnelists who are familiar with how remarks are submitted to DCPDS.

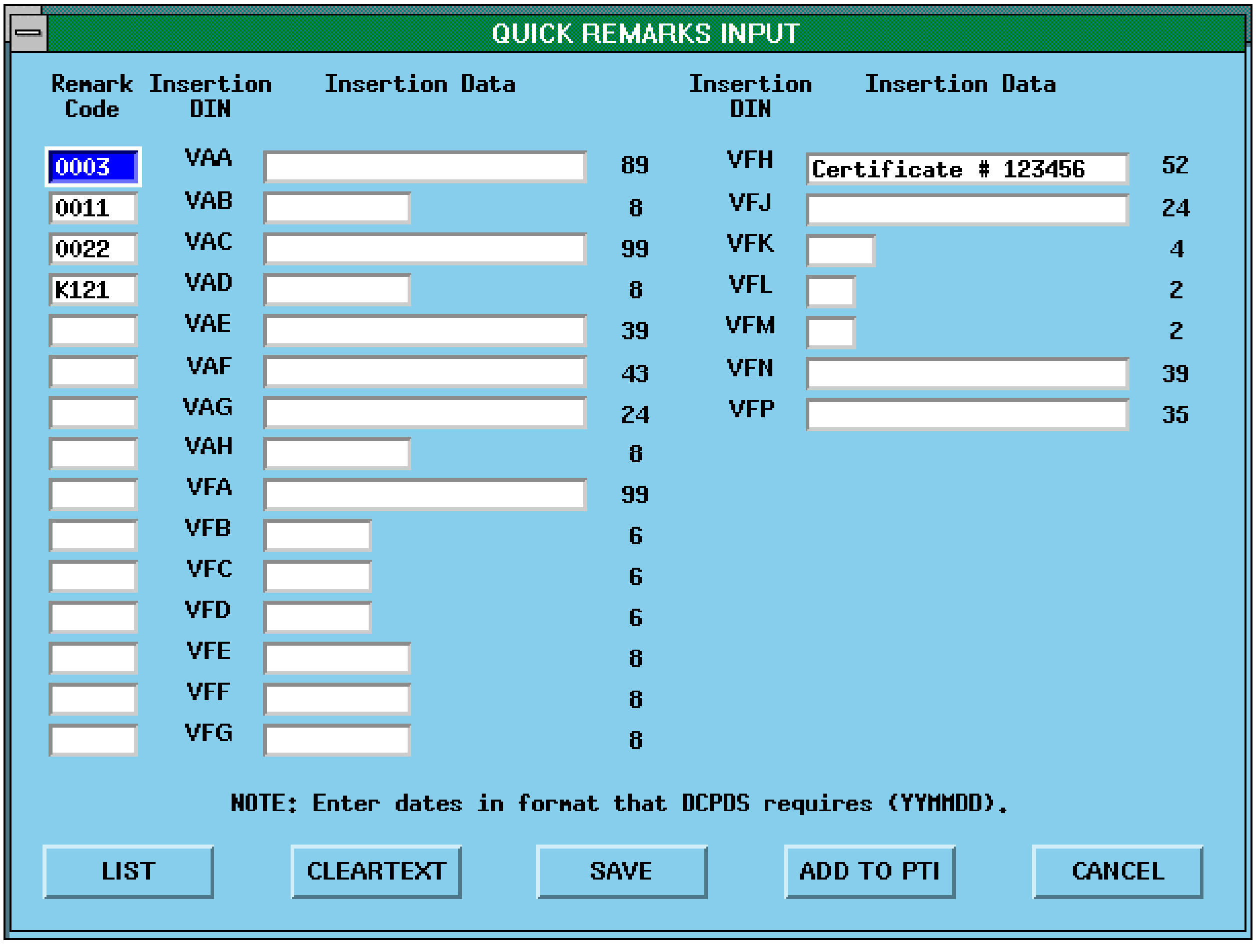

Figure 8-20. Advanced Remarks

This screen contains a column(s) for Remark Code, Insertion DIN, and Insertion Data. It also contains five command buttons, including “LIST,” “CLEARTEXT,” “SAVE,” “ADD to PTI,” and “CANCEL.” These command buttons are described below:

- **LIST.** This command button is highlighted only if the personnelist has access to a DCPDS Central or Local Table.
- **CLEARTEXT.** This command button provides a clear text for a DIN identifier.
- **SAVE.** This command button saves the data input on this screen **WITHOUT SENDING THE DATA TO THE PTI.**

- **ADD TO PTI**. This command button saves the changes to this screen **and** submits the data to the PTI string.
- **CANCEL**. This command button returns the application to the "Remarks Processing" menu.

When an Insertion DIN is selected, the remark code for the DIN is highlighted along with the codes of other Insertion DINs. Personnelists may look up a remark code using either Central or Local remarks. They may also use the vertical scroll bar to navigate through the remarks table. The horizontal bar may be used to view the text for a remark.

Once the remark is located, click the "OK" command button. When completed, click "ADD TO PTI" to save the remarks and allow transmission of the PTI to DCPDS.

Approving a Personnel Action Request

After the Personnel Action Request and the DIN screens are completed, move to page four of the Personnel Action Request. If the personnelist is not the final approver, then either block A or B through F of Part C should be completed to indicate the action has been reviewed and cleared for further processing.

Reviews and Clearances

Figure 8-21 Review and Approval Dialog Box

To complete the review process, click the first vacant initials block under Reviews and Approval and then enter a password in the "Enter your password to COORDINATE this request" block (see Figure 8-21). Press the **[Tab]** key to move the screen pointer to the "Office/Function" block, where the reviewer's office, the alpha-numeric code or name is entered. As an example, the personnelist may enter "Priority Placement Program Coordinator" in that block and then click the "OK" command button to return to Part C. The application then fills in the personnelist's Organization Code and Current Date.

Once an action is authorized, personnelists may unauthorize it by clicking the "DELETE" command button. Once the password has been removed, the application allow the personnelist to enter a new password.

After clicking the "OK" command button, the application returns to the In Box to coordinate the action. Personnelists may coordinate the action by clicking the "COORD" command button, which sends the action to either the next reviewer or the personnelist with authority to approve the action. **See Chapter Six for detailed instructions on how to coordinate a Personnel Action Request.**

Final Approval of the Personnel Action Request

A Personnel Action Request is approved by clicking the signature block, which generates the screen displayed in Figure 8-22.

Figure 8-22. Approval Password Dialog Box

Personnelists enter their passwords using the block provided in the dialog box. To complete the approval of the form, the “OK” command button **must** be clicked.

After the password is entered in the block, use the “CLEAR” command button to reenter the password. Click the “CANCEL” command button to return the application to Part C.

Coordinating the Personnel Action Request. After personnelists approve a personnel action request, they must return to their In Boxes. From the In Box, click the “COORD” command button to send the action to the personnelist who is responsible for transmitting the Personnel Action Request to DCPDS. **For detailed instructions on how to coordinate a Personnel Action Request, see Chapter Six of this Guide.**

Transmitting a Single Transaction to DCPDS

Reviewing and Verifying a PTI

After the Personnel Action Request is approved, submit the PTI to DCPDS. PERSACTION automatically generates a PTI from the information found in the DIN and REMARKS data base files. To create a PTI string, click the PTI button located on either Page Five of the Personnel Action Request or the In Box. The application then displays a PTI Send/Receive screen (see Figure 8-23).

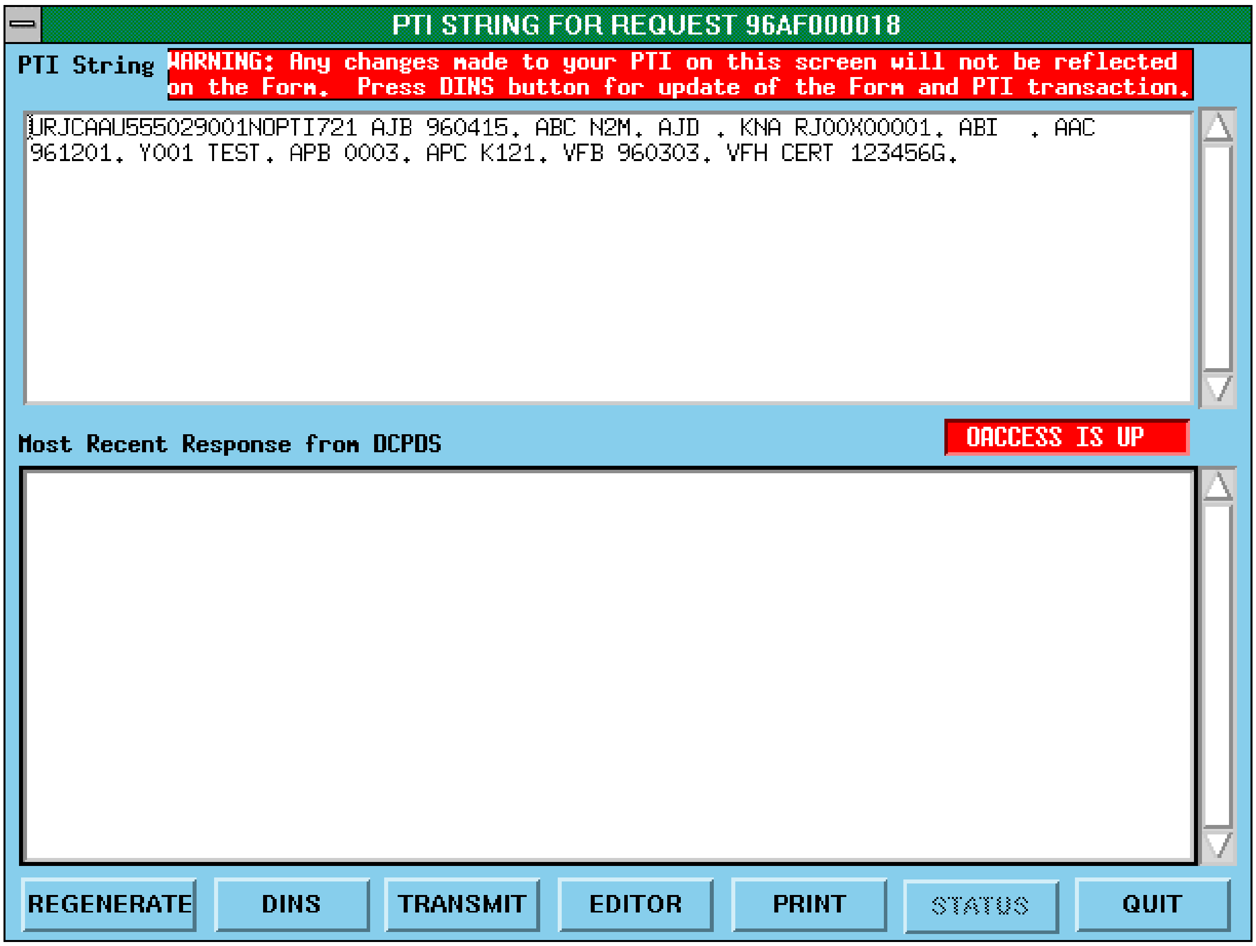

Figure 8-23. PTI Send/Receive Screen

This figure contains two windows -- the top window shows the "PTI String" that lists all DINs that were inputted for that PTI and the lower window shows the "Most Recent Response from DCPDS".

If the PTI information is correct, click the "TRANSMIT" button. The application will begin transmitting the PTI to DCPDS. The application will temporarily disable the "TRANSMIT" button and activate the "Status" button. If the transaction is lost, the application will automatically turn the "TRANSMIT" button back on.

Users will notice that a status feature has been added to the message bar on the PTI Send/Received Screen (see Figure 8-24). The status feature allows users to determine the transaction status for each action. The application will notify users that the transaction is: (1) Pending - a response has not come back from DCPDS; (2) Rejected - the transaction has rejected in DCPDS; (3) Updated - the transaction has updated DCPDS; or (4) lost.

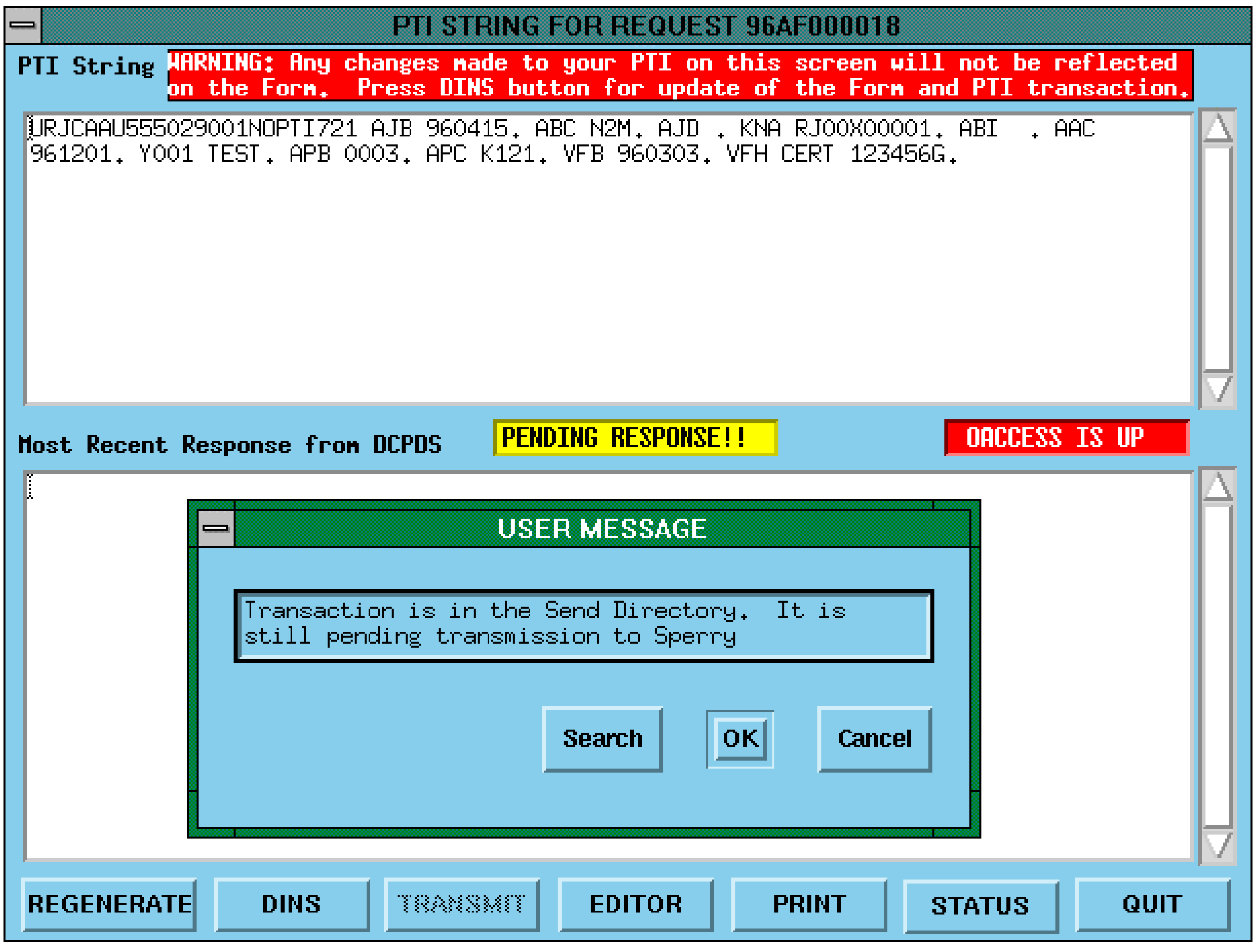

Figure 8-24 PTI Send/Receive Screen - User Message Dialog Box

For illustration purposes, Figure 8-24 shows a transaction whose status is "Pending Response".

By clicking the "STATUS" button, the application displays a user message window describing the reason(s) for the delay in transmitting the action to DCPDS.

Normally, the entire message will appear on the screen. For Mass (multiple) Actions, users can use one of two methods to read the messages located in this window. They can place the screen pointer on the scroll bar and click the **[Down Arrow]** until the entire message appears. They can also click the "SEARCH" button. A pop-up window then permits users to search for a work or group of words.

When a response has been received, the application displays a **"R"** under the column labeled **"S"** in the In Box. A question mark in this column indicates that a response has not been received from DCPDS.

Verifying the DCPDS response. To view the response, click the "PTI" command button that is located either on page five or in the In Box. If the DINs for the PTI are complete, the "Most Recent Response from DCPDS" window displays the message "Transaction Complete -- Record Updated". Click the "Most Recent Response from DCPDS" window to activate the window and use the up and down bar on the right side of the window to scroll through all response messages.

✔ **WARNING** Any changes made to the PTI String **WILL NOT** also be made on the Personnel Action Request.

Personnelists **MUST** click the "DINs" command button at the bottom of the screen to input values into the appropriate DIN Identifiers. Clicking the "OK" command button enables the application to update the Personnel Action Request **and** PTI String before transmitting the action to DCPDS again.

Using the PTI Editor

The PTI Editor may be used to magnify the response from DCPDS (see Figure 8-25). If the DINs for the PTI are incomplete, the application generates error messages stating which DINs are missing or incorrect.

DO NOT USE THE EDITOR TO MAKE CORRECTIONS TO THE PTI STRING; MAKE THOSE CORRECTIONS BY RETURNING TO THE DIN SCREEN.

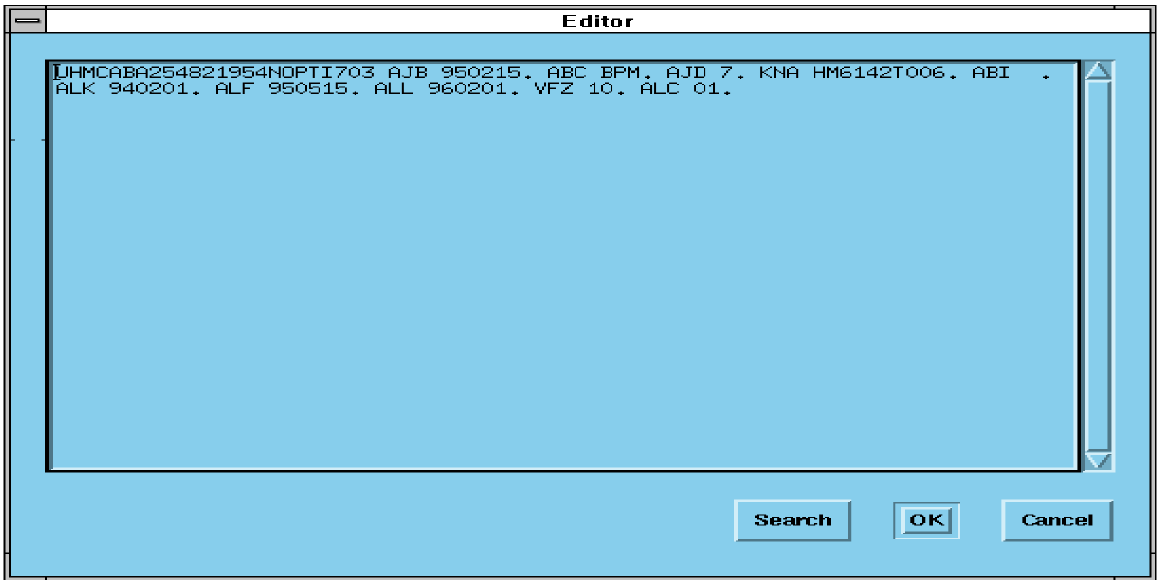

Figure 8-25. PTI Editor Screen

Submitting a PTI to DCPDS

Click the "PTI" command button located in the In Box or on page five to display the "PTI Send/Receive" screen. (Only information that has been inputted on the Personnel Action Request, remarks screen, and DINs screens are used to generate the PTI.) If a PTI String already exists, then the following screen appears.

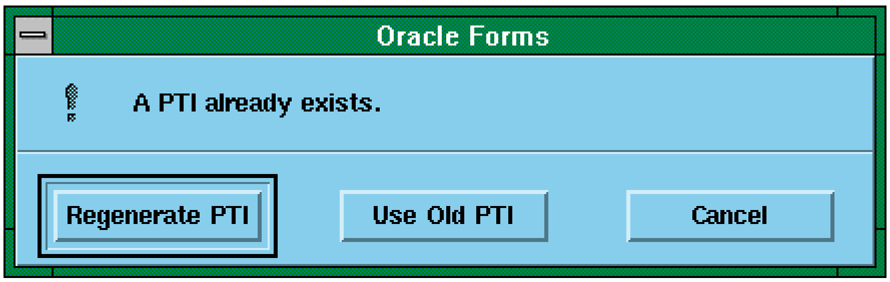

Figure 8-26. Oracle Forms Dialog Box

This screen shows a dialog box that notifies the personnelist that a PTI String was previously submitted to DCPDS. The box contains three command buttons, "REGENERATE PTI," "USE OLD PTI," and "CANCEL." The "CANCEL" button returns the application to the previous screen.

The **"REGENERATE PTI"** button recreates the PTI if any changes have been made since it was last generated. Clicking this button returns the application to the PTI Send/Receive Screen (Figure 8-23). The **"USE OLD PTI**" button allows personnelists to use the existing PTI String.

After selecting which PTI string to use, the application displays the PTI Send/Receive Screen. Click the "TRANSMIT" command button. If any modifications have been made to the Personnel Action Request, DIN, or Remark screens, they can be incorporated into the PTI transaction by clicking the "REGENERATE" command button.

When all the corrections are made, the application responds with a "Transaction Completed--Record Updated" message. If errors are still present, specific error messages will appear. The personnelist then repeats the steps outlined above to correct the errors. Special Instructions for Generating a PTI Transaction.

- The PTI Editor Screen can **ONLY** be used to perform inquires on an employee or position record in DCPDS. **Using any other DCPDS command will cause software malfunctions**.
- The PTI Editor Screen **should** be used to create a Cancellation (PTI 001) action when DCPDS has rejected a projected action.

To close the "PTI String" from the DCPDS Window click the "Quit" command button.

Transmitting Mass Actions to DCPDS

After selecting which PTI string to use, the application displays the PTI Send/Receive Screen. Click the "TRANSMIT" button. Wait for the DCPDS response to appear in the "Most Recent Response from DCPDS" window. Place the cursor inside the "Most Recent Response from DCPDS" window to activate the window.

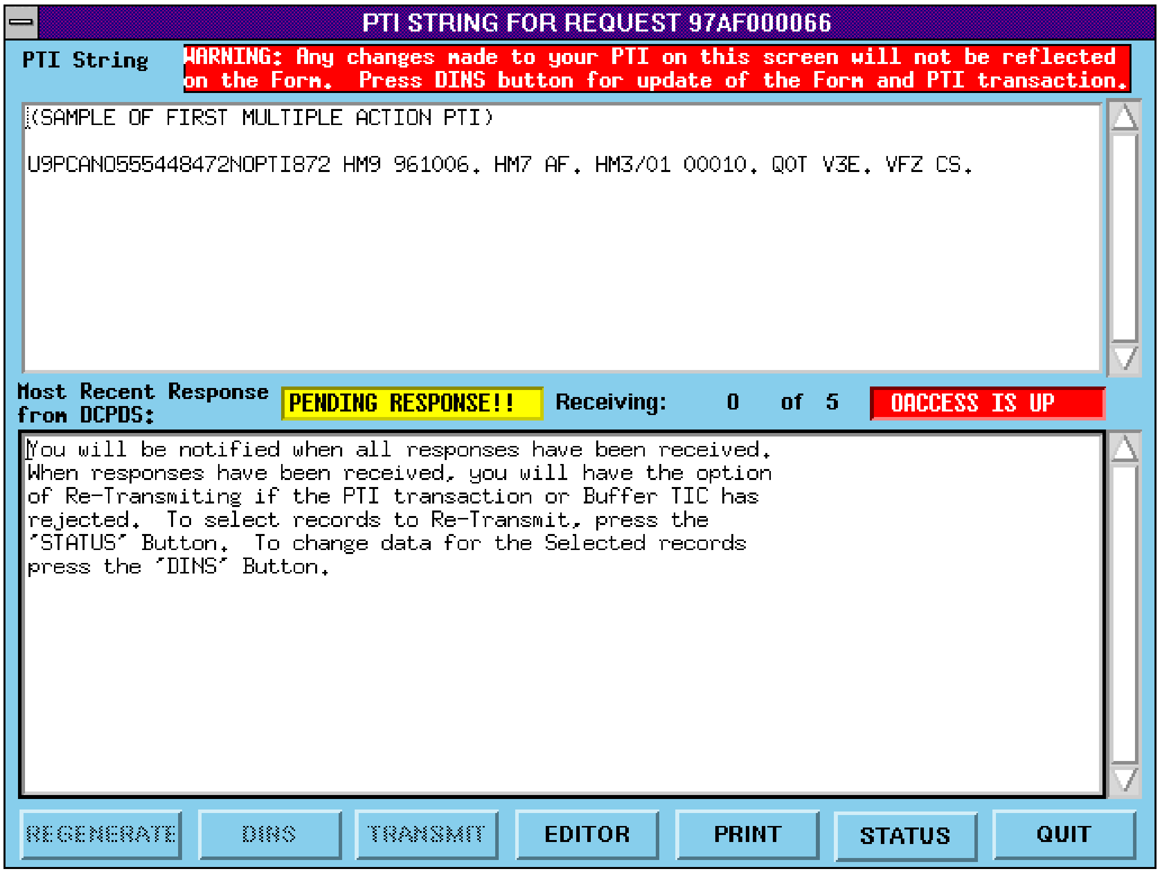

Figure 8-27. Send/Receive PTI Screen - Mass Actions

Users will notice a message in the middle of the split screen that informs them of the number of transactions currently received from DCPDS out of the total transmitted. Users will be notified when all the responses have been received.

The PTI process has been changed for multiple actions to allow users to re-transmit actions that are rejected in DCPDS. If a transaction has been lost, the application will automatically re-active the "TRANSMIT" button. To select the records for transmission, press the "Status" button. Users must select the "DINS" button to modify any data in the PTI string.

The PTI Send/Receive Screen has been modified to allow users to access the Mass Awards Module by pressing the DINS button. Previously when a record was reject in DCPDS, the user had to the In Box screen and click the "EDIT" button. User would then click the SSAN block before they could correct the error. This has been corrected, if there is an error in the PTI window, the user can click on the DINS button to access the Mass Awards Module.

Click the “Status” button and the application will display a “Status of Mass Action” dialog box (Figure 8-28).

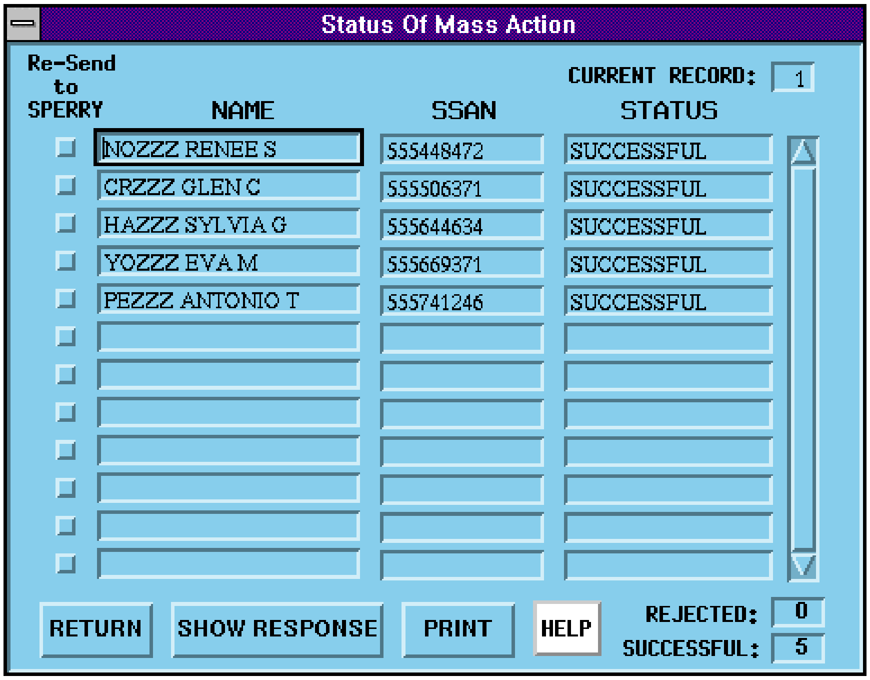

Figure 8-28. Status Dialog Box - Mass Actions

The “Status of Mass Action” dialog box provides users with the following information and special features:

- A status column indicating, how many records rejected, pending or successful
- A “Show Response” button provides “PTI string and response from DCPDS for individual employee record (highlighted).
- A Help button provides users helpful information on the functionality of the STATUS OF MASS ACTION Screen.

Closing a Personnel Action Request

When an action has been submitted and DCPDS updated, it can be closed. Once an action has been closed, it will no longer appear in the In Box. However, the data associated with the Personnel Action Request may by accessed through use of the Action Tracker. Personnelists may also generate the "Group Status Reports - All Action" by clicking the "REPORTS" button located on the PERSACTION Title Screen and the In Box. **For more information on generating reports, see Chapter Seven of this Guide.**

Selecting the "CLOSE" button in the In Box displays the "Close Personnel Action Request" dialog box (see Figure 8-29).

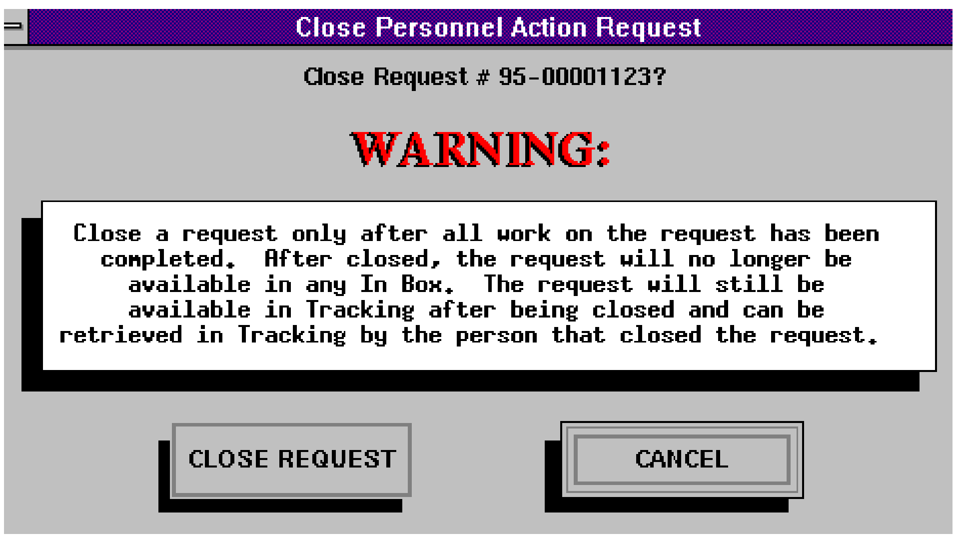

Figure 8-29. Close Personnel Action Request Dialog Box

Click the "CLOSE REQUEST" command button to remove the Personnel Action Request from the In Box. However, it may be retrieved through the Tracking feature (see Chapter Six).

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WHO TO CONTACT?

Questions or problems may arise during the fielding of any software application. Therefore, a list of contacts is provided to answer questions, receive suggestions for improvements to the software or reference materials and/or resolve technical problems. Chapter One provides more detailed information regarding assistance and problem reporting.

REGIONAL APPLICATION HELP DESK

If users cannot resolve technical or functional problems with PERSACTION, they should contact the local Integrated Personnel Process Improvement (PPI) Suite Program Coordinator(s). If the local Integrated Personnel Process Improvement Suite Program Coordinator is not available, users may contact the Air Force Personnel Center (AFPC) Software Distribution Center Help Desk. The Help Desk's telephone numbers are: toll free, 1-800-638-3487, commercial, (210) 652-3995/2849; and DSN, 487-3995/2849. The fax number is (210) 652-5800.

USER'S GUIDE

Any discrepancies, errors or suggestions for improvement should be reported by the Program Coordinator(s) to the Defense Civilian Personnel Management Service, Regionalization and Modernization Functional Program Office by electronic mail or fax. If sending by email, the address is: carolyn.mcknight@cpms.osd.mil. The fax number is: (703) 696-5468.

PERSACTION Program Manager

General questions concerning the fielding and support of PERSACTION may be addressed to the Program Manager, Roger Kriesch. He can be contacted by telephone at (703) 696-4553 or DSN, 426-4553, or via email at roger.kriesch@cpms.osd.mil. The project manager is Robert Schmidt. He can be contacted by telephone on (703)696-2666 or DSN 426-2666 or via fax on DSN 426-5430.

OR

Try our Word Wide Web Home Page at http://www.cpms.osd.mil/. You may contact the Program Manager, the Project Manager and the Help Desk from the DCPMS Home Page.

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PERSACTION Quick Help for Personnelists

Initiating a PERSACTION Session

1. Open PERSACTION by clicking the Integrated Personnel Process Improvement (PPI) Suite Icon from the Program Manager screen.

2. Type your Username and press the **[Tab]** key. Enter your password. Click the "**CONNECT**" command button. The application then displays the PPI Application Menu screen.

3. Click the "PERSACTION" command button. The application then displays your **In Box**.

Processing a SF-52 Action

1. Click the "**EDIT**" command button located at the bottom of your **In Box**.

2. Click the "**Standard Form 52**" option and then the "**OK**" command button.

3. Go to the "**SSAN**" block and click the "**LIST**" command button. Highlight a employee's record. Click the "**OK**" command button to select that record.

4. Open *Page Two* by clicking the key labeled "**2**" at the bottom of the screen. Enter the "**From Side**" data for employees not in your DCPDS database file.

5. Go to the second block underneath the "**To: Position and Title**" on the "**To Side**" of the SF-52. If blank, select "**LIST**" option for encumbered/unencumbered positions available. Highlight your selection of **Civilian Personnel Control Number. Click** "OK".

6. Go to the "**To: Name and Location of Org**." block. Use the scroll bars to locate an organization and click the "**OK**" command button.

7. Open *Page Three* by clicking the key labeled "**3**" at the bottom of the screen. Using the "**List**" option, enter a value for the each of the blocks on the form.

8. Open *Page Four* by clicking the key labeled "**4**" at the bottom of the screen. Go to **"Parts C - Review and Approvals**". If you have authorization to sign a SF-52, enter your password on the signature block. Otherwise, go to block A and enter your password and office symbol.

9. Open *Page Five* by clicking the key labeled "**5**" at the bottom of the screen. Activate the "**DIN**" command button. Click the button next to each DIN identifier that you want to flow to the PTI string. Click "**OK**" to return to the **SF-52**.

10. Click the "**REMARKS**" command button. Select "**Regular**" or "**Advanced**" Remarks. Select "**Central**" or "**Local**" DCPDS table. Use the "**LIST**" option to locate a remark code and click the "**SELECT**" command button. Enter a date or clear text as requested by the application. Click the "**OK**" command button to return to the **SF-52**.

11. Click the "**PTI**" command button. Review the PTI string for accuracy. Click the "**TRANSMIT**" button to send the data to DCPDS.

12. Click the "**Most Recent Response from DCPDS**" window. Use the scroll bars to review the entire response from DCPDS.

PERSACTION Quick Help for Personnelists

Coordinating a Single SF-52

1. Go to your **In Box**. Click the line containing the request action.

2. Click the "**COORD**" command button. A **Coordination Options** dialog box will appear. Click the "Select Record" command button. The application displays the **Coordination** screen.

3. To add an addressee to the route slip, click the "**ADD**" command button. You may search through a list of employee names by clicking the **People** checkbox. Click the **"Show All**" command button.

4. After the list of names appear, use the "**Find**" option to locate the name of a particular employee. Highlight the employee's record, then click the **"Select"** command button. *Repeat this step to add other employees to the route slip*.

5. Click the "**OK**" command button to send the action to the next user on the route slip.

Tracking a SF-52

1. Click the "**TRACK**" command button located at the bottom of your **In Box**. The application then displays the Coordination Tracking screen.

2. Go to the **Request Number** block and then click the "**LIST**" command button. Use the scroll bars to highlight the desired **Request Number** and then click the "**OK**" command button.

3. To display the SF-52, click the **"VIEW"** command button. Click the **"OK"** command button to return to the Coordination Tracking screen.

4. Click the "**QUIT**" command button to return to your **In Box**.

Logging off PERSACTION

1. Go to your **In Box**. Click the "**QUIT**" command button.

2. Click the "**EXIT**" command button to return to the Program Manager screen.

PERSACTION Quick Help for Managers

Initiating a PERSACTION Session

1. Open PERSACTION by clicking the Integrated Personnel Process Improvement (PPI) Suite icon from the Program Manager screen.

2. Type your Username and press the **[Tab]** key. Enter your password. Click the "**CONNECT**" command button. The application displays the PPI Application Menu screen.

3. Click the "PERSACTION" option. The application then displays your **In Box**.

Creating a SF-52 Action

1. Click the "**CREATE**" command button located at the bottom of your **In Box**.

2. Click the "**Standard Form 52**" option and then the "**OK**" command button.

3. Using the scroll bars, highlight "**Actions Requested Type**" from the dialog box. Click the "**OK**" command button. *To establish a new position, go to Step* **7** *below.*

4. Go to the "**SSAN**" block and click the "**LIST**" command button. PERSACTION displays a dialog box containing a list of employees within your organization.

5. Using the scroll bars or the **[Arrow]** keys locate an employee's record. Click the "**OK**" command button to select.

6. Open *Page Two* by clicking the key labeled "**2**" at the bottom of the screen. *To change the data on the* "**To Side**" *of the SF-52, follow Steps* **7,** *through* **9.** *Otherwise, go to Step* **10.**

7. Go to the second block underneath the "**To: Position and Title**" on the "**To Side**" of the SF-52. Click the "**LIST**" command button. The application displays a dialog box with two choices, click "**Unencumbered"**.

8. Use the scroll bars or the "**Find**" option to locate a position record, then click the "**OK**" command button.

9. Go to the "**To: Name and Location of Org.**" block. The application displays a dialog box containing a list of organization components. Use the scroll bars to locate an organization, then click the "**OK"** command button.

10. Open *Page Three* by clicking the key labeled "**3**" at the bottom of the screen. Using the "**List**" option, enter a value for one or more of the following blocks **Work Schedule, Part-Time Hours, Appropriation Code, Duty Station Code, and Agency Code**.

11. Open *Page Four* by clicking the key labeled "**4**" at the bottom of the screen. Go to "**Part D - Remarks by Requesting Office**". Type in a message concerning the action.

12. Return to *Page One* of the SF-52. Go to either the block underneath the "**Action Requested By**" or the "**Action Authorized By**" block. Enter your password and click the "**OK**" command button.

PERSACTION Quick Help for Managers

Coordinating a Single SF-52

1. Go to your **In Box**. Click the line containing the request action.

2. Click the "**COORD**" command button. A **Coordination Options** dialog box will appear. Click the "Select Record" command button. The application displays the **Coordination** screen.

3. To add an addressee to the route slip, click the "**ADD**" command button. You may search through a list of employee names by clicking the **People** checkbox. Click the **"Show All**" command button.

4. After the list of names appear, use the "**Find**" option to locate the name of a particular employee. Highlight the employee's record, then click the **"Select"** command button. *Repeat this step to add other employees to the route slip*.

5. Click the "**OK**" command button to send the action to the next user on the route slip.

Tracking a SF-52

1. Click the "**TRACK**" command button located at the bottom of your **In Box**. The application then displays the Coordination Tracking screen.

2. Go to the **Request Number** block and click the "**LIST**" command button. Use the scroll bars to highlight the desired **Request Number** and then click the "**OK**" command button.

3. To display the SF-52, click the "**VIEW**" command button. Click the "**OK**" command button to return to the Coordination Tracking screen.

4. Click the "**QUIT**" command button to return to your **In Box**.

Logging off PERSACTION

1. Go to your **In Box**. Click the "**QUIT**" command button.

2. Click the "**EXIT**" command button to return to the Program Manager screen.